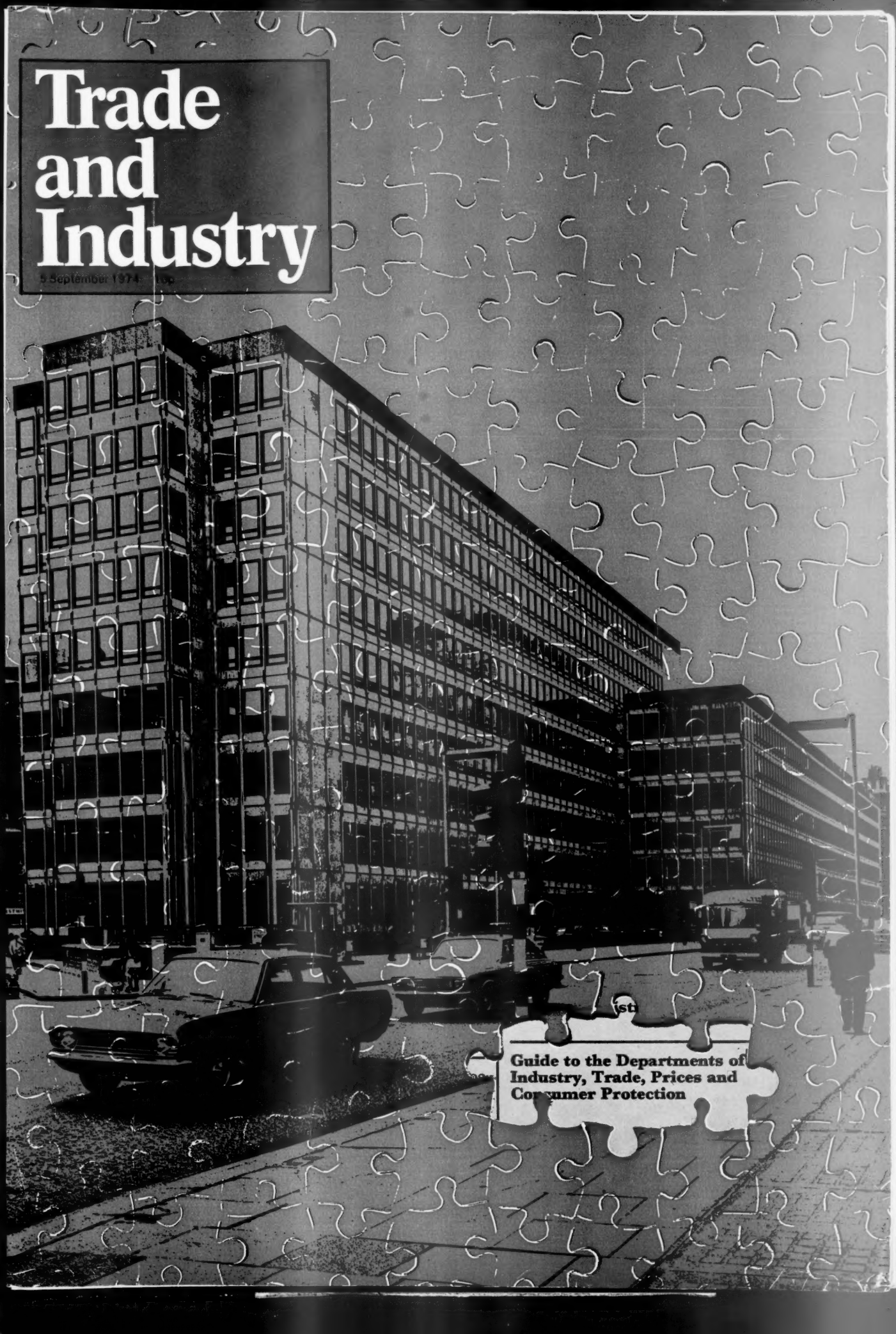
Trade and Industry

5 September 1974



Guide to the Departments of Industry, Trade, Prices and Consumer Protection

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Trade and Industry

5 September 1974

The cover picture shows 1 Victoria Street, London, headquarters of three Government Departments – Industry, Trade, and Prices and Consumer Protection. And there are many other buildings, in and out of London, where the work of these Departments is carried on. To give readers a quick way of finding the pieces of Government machinery with which they are concerned and of fitting them into the complete picture, we publish this week a revised guide to the three Departments.

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Farnborough Report

New British aircraft steal first international show

Two notable British aircraft 'firsts' stole the first fully international Farnborough air show. One civil and one military, both had made their maiden flights less than two weeks prior to the opening of the show. They are Shorts SD3-30 commuter and local services airliner and the Hawker Siddeley Hawk dual purpose ground attack/trainer aircraft.

Shorts SD3-30

The maiden flight of the 30-seat SD3-30 marked the completion of a priority programme which had seen the project transformed from the drawing board to an operational aircraft in less than 12 months. The first sales of the new aircraft have also been announced – three to Command Airways of Poughkeepsie, New York. The SD3-30 is the first 30-passenger airliner produced to meet the new Part 298 of the CAB's Economic Regulations governing commuter operations in the United States, and a number of other airlines are also showing interest in the aircraft.

Designed to bring new standards of comfort to commuter and local service travel, the SD3-30 has a wide body, walkabout headroom, airconditioning, full washroom facilities and a beverage galley. The 'wide look' cabin accommodates its 30 passengers in 10 rows of three-abreast seats and provides facilities for in flight service.

It is claimed that the SD3-30 provides increased fleet utilization and profitability because of the additional revenue it can generate as a cargo carrier. A large forward cargo door, capable of accepting D-size containers, is fitted to facilitate use of the aircraft in mixed passenger/cargo or all-cargo configuration when 7500 lb. of payload can be carried. Another feature of the new aircraft, which is due to enter service in early 1976, is its remarkably low noise level, assured by its Pratt & Whitney PT6 free turbines and low-speed five-blade propellers.

Hawker Siddeley Hawk

Also scheduled to enter service in 1976, the Hawk will replace the RAF's current Gnat and Hunter fleets, as well as a proportion of its Jet Provosts, performing the roles of primary and advanced training in addition to weapons training. The RAF has ordered 175 of the two-seat aircraft, powered by a single Rolls-Royce Turbomeca Adour engine rated at 5,200 lb take-off thrust. Several countries are said to be considering buying Hawks, and Hawker Siddeley is confident that it will capture a significant share of the estimated world market of 3,000.

The Hawk is being built straight from drawing board to production standard. The aircraft on show at Farnborough is a pre-production aircraft that will be used as part of the development programme, for there are no prototypes. All equipment for the Hawk has been selected as representing the best in modern proven technology, and a metal engineering mock-up is used at Kingston to prove systems installations.

Hawk manufacture is based on three HSA factories – at Kingston, the main design and production centre; at Brough, Yorkshire, which produces the wing, tailplane and fin; and at Hamble, near Southampton, where the rear and rear centre fuselage units, nose cone, canopy and windscreen are produced. Production will build up to a rate of four aircraft per month, enabling completion of the RAF deliveries by 1980.

A bigger One-Eleven?

A bigger and quieter development of the British Aircraft Corporation's highly successful One-Eleven – to be known as the One-Eleven 700 – is currently being evaluated.

Powered by Rolls-Royce's proposed new Spey 605 quiet jet derivative, the BAC One-Eleven 700 will carry up to 134 passengers with a modern 'wide cabin' look over ranges of up to 2,000 miles (3,219 km).

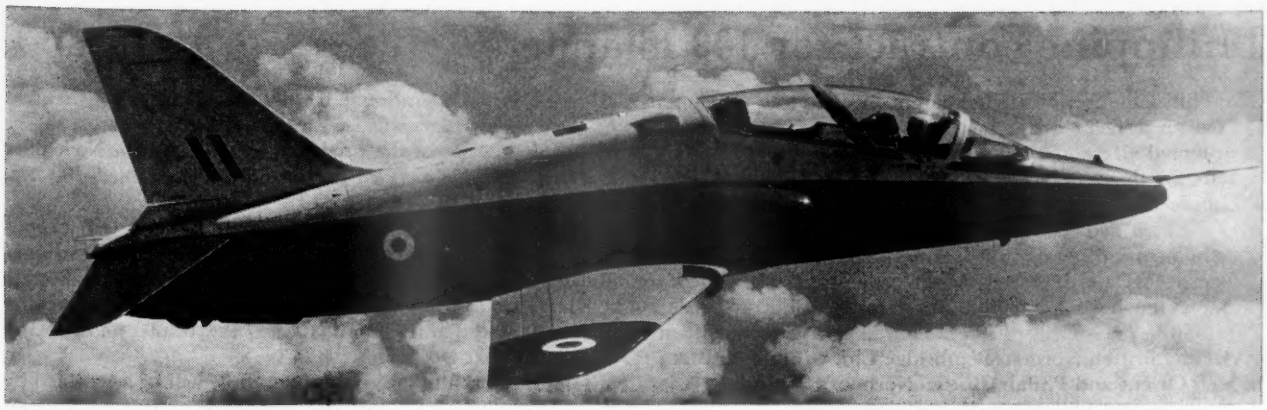
Directly derived from the One-Eleven 500, this latest One-Eleven proposal would offer a new order of quietness and at the same time offers both improved performance and economy for regional jet operations.

Hush kits

Meanwhile, BAC are pressing ahead with the development of 'Hush Kits' for the One-Eleven's twin Spey engines. On show at Farnborough was BAC's own development One-Eleven, which has recently completed ground and flight development of these new noise suppression kits.

Jointly developed by BAC and Rolls-Royce, the kits aim to bring all versions of the One-Eleven family within the newly emerging community noise regulations – notably those of the International Civil Aviation Organisation (ICAO) Annex 16.

In practice this means that the noise-affected land area round airports (ie the area of the 90 PNdB noise contour) will be approximately halved and thus be of a similar area to the equivalent noise footprints of the older twin turbo-props and the big new quiet trijets. Production versions will be available from the end of 1975.



Making its first public appearance was Britain's newest military aircraft, the Hawker Siddeley Hawk dual purpose ground attack/trainer.

BAC's record exports

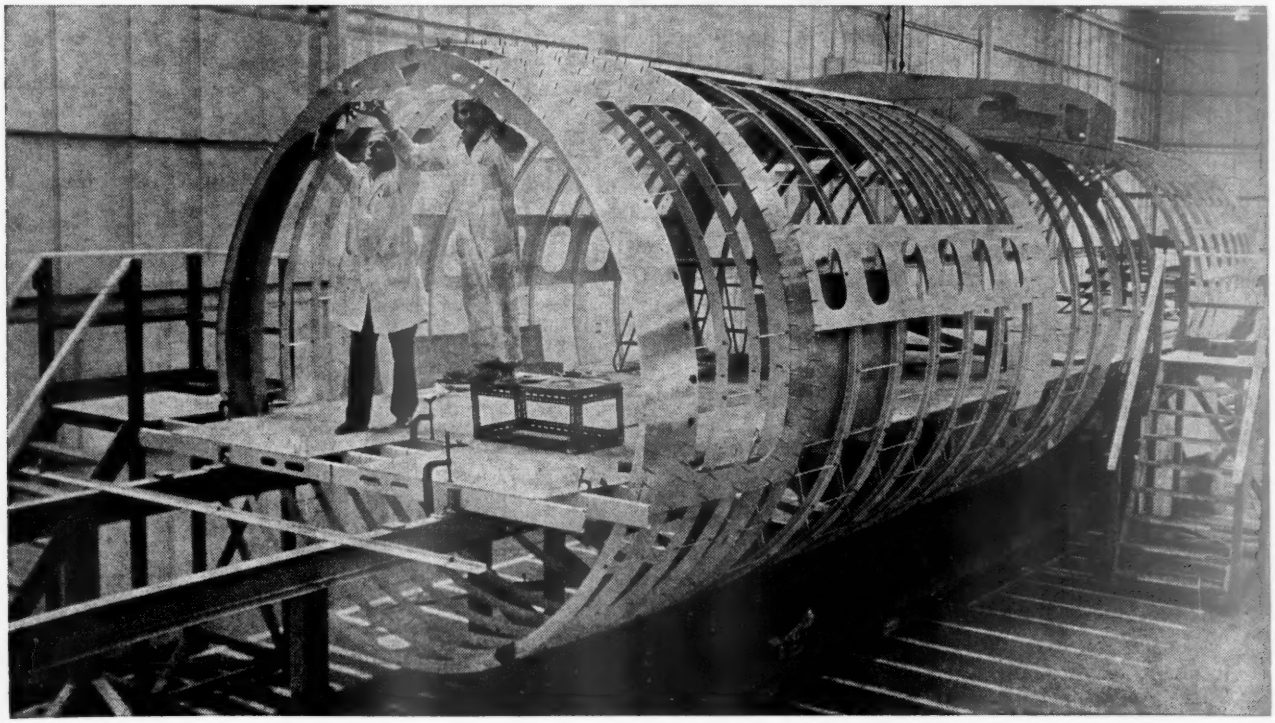
On the first day of the Farnborough show, the British Aircraft Corporation announced that recent export sales of its Jaguar aircraft and Guided Weapons had brought its pre-Farnborough order book to a record £818 millions. Of this, £593 millions – over 72 per cent – is for export. Of the total £818 million some £100 million is on account of Concorde.

HS 146 Production commences

In addition to the Hawk, Hawker Siddeley showed a full scale mock-up of the forward section of their ultra-quiet HS 146 fan jet short/medium haul airliner. Production of the 70/100 passenger HS 146 has commenced; first flight is scheduled for December next year with customer deliveries starting early in 1977.

Also on show for the first time in public is the 'quiet' version of its successful HS 125-600 business jet. New engine silencers reduce noise levels to comply with the requirements of both the American FAR Part 36 and ICAO Annex 16 regulations. First customer delivery will be later this year, after which the equipment will be standard to all production aircraft.

The primary structure of the HS 146 Engineering Mock-up under construction. The EMU is now ready for the trial installation of the aircraft systems prior to their incorporation in the first production HS 146.



Philippine contract for 100 Islanders

The Philippine Aerospace Development Corporation has concluded an agreement for one of the largest single orders for British civil aircraft ever made.

It is for the progressive assembly and manufacture in the Philippines of 100 Britten Norman Islanders in four phases over the next five years to supply the country's requirements – both in the public and private sectors – for light utility aircraft.

The PADC is a Government corporation established to promote the development of the aerospace industry in the Philippines. The supply of Isander aircraft was negotiated with PADC by Britten Norman Bembridge Ltd. with the assistance of Heli Orient and Philair, Britten Norman's South East Asian distributors and Philippine dealers respectively.

While in Manilla, Mr. Desmond Norman was received by President Marcos who expressed his approval of the use of the Islander to help improve communications between the numerous islands in the Philippines. He was particularly enthusiastic that, in the process of acquiring Islanders for operational requirements, PADC would have the opportunity to develop technical capability in the manufacture of the aircraft, its sub-assemblies and major components.

The order was placed after the Philippine Government had conducted a major survey into the needs for an internal transport system that encompassed not only the major cities but also the rural countryside where the majority of the Philippine population is dispersed. It was decided that the Islander would serve as an ideal multi-purpose aircraft which could be utilised for feeder passenger and freight transport, air ambulance services and crop spraying.

One significant consequence of the agreement is the development of an amphibious float plane version of the Islander. When operational, it will be used extensively in areas at present only accessible by water.

The first phase of the programme will begin in November 1974 with the delivery of the first of six assembled 300 h.p. Islanders to PADC.

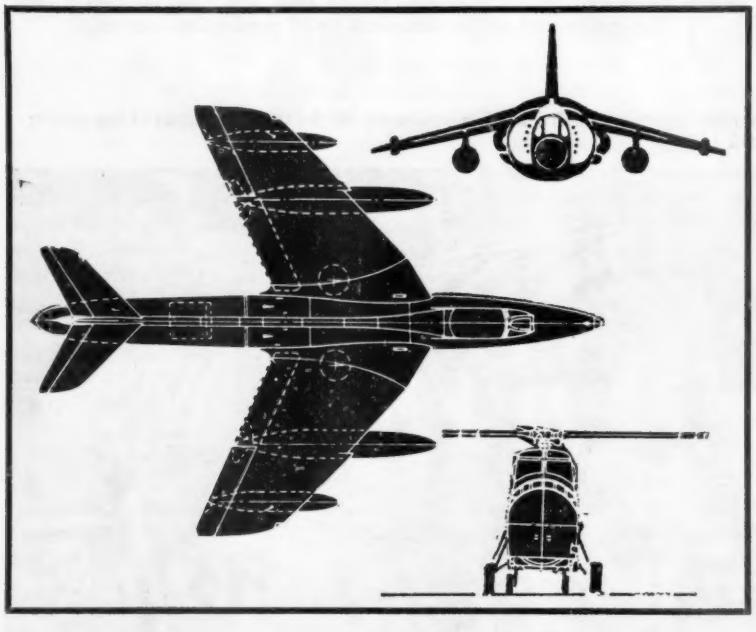
The second phase of the operation involves 14 aircraft which will be delivered to Manilla without trim, furnishings and avionics. PADC will then fit out these aircraft at the rate of one a month from next February, with the rate increasing to two a month three months later, the whole phase being completed next December.

The 20 aircraft involved in phase three will be assembled by PADC from knocked down kits supplied from Britten Norman and shipped to the Philippines.

The final phase will include the manufacture of sub assemblies and other aircraft components using jigs and detailed parts supplied from the United Kingdom. Of the 60 aircraft to be assembled in phase four, some 25 will be re-purchased by Britten Norman for sales throughout the world.

Once the ampnibious float plane version of the Islander is operational, it is planned that PADC will become the sole installation centre in Australasia.

Philippine Aerotransport, a PADC subsidiary, will operate most of the aircraft acquired through the Islander programme. This organisation was formed to provide much needed cargo transport and feeder air services. It is envisaged that up to 10 major cities in the Philippines already connected by scheduled jet and prop jet services will serve as the 'hubs' for the Islander feeder network. It is hoped that over 100 extra communities will be served by regular Islander services by 1977.



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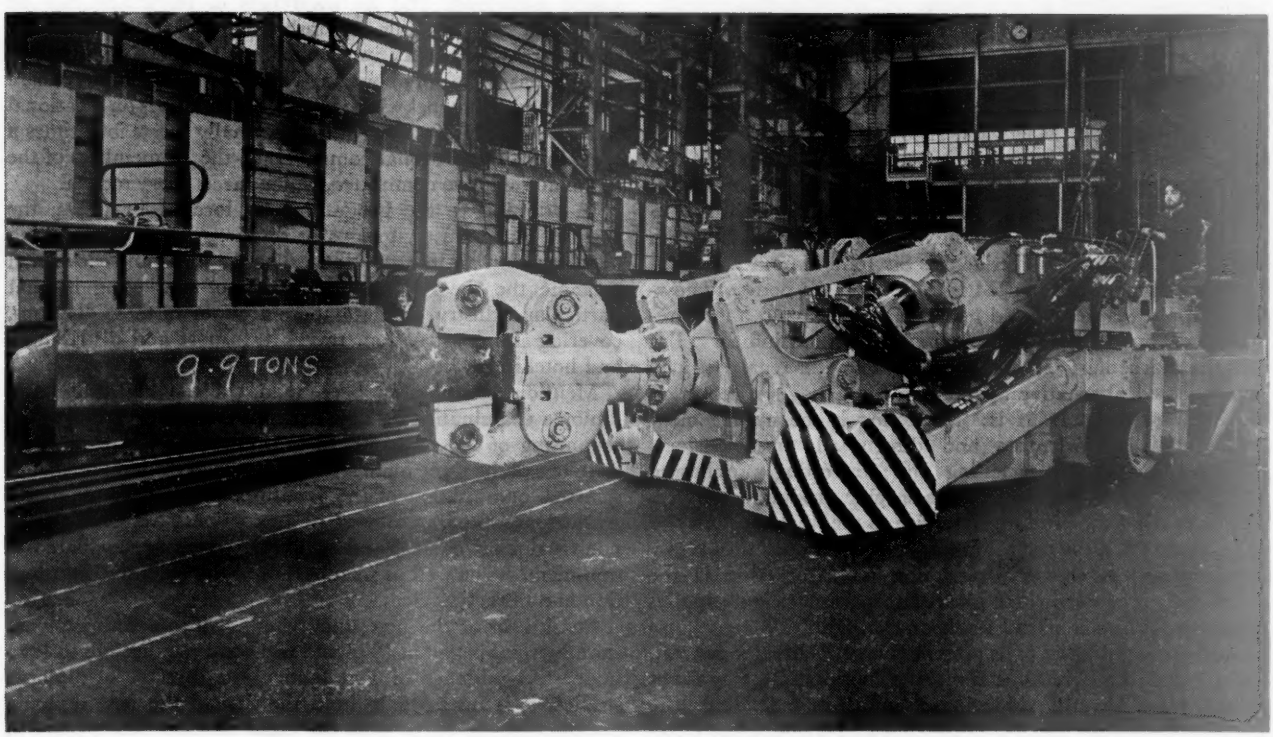
The new Short SD3-30 30-seat airliner for commuter and feeder service operation.

. . . Including the kitchen sink!

Although it is usually the aircraft and engine builders who attract the glare of publicity in the manufacturing side of the aviation industry, there are of course the many suppliers of the thousands of components which go to make up today's highly complicated modern aircraft and which help to bring to Britain each year millions of pounds worth of foreign currency earnings.

At Farnborough the public has the opportunity to see what these suppliers contribute to the industry. During the show, for example, C. F. Taylor (Metal Workers) Ltd., of Wokingham, announced that it had just captured export orders worth nearly £1 million for four sets of galleys for Boeing 747 jumbo jets. One of the sets was a repeat order from Qantas Airways, which has now ordered six such sets for its 747s. The latest contract from the Australian airline also calls for the design and manufacture of a new type of cocktail unit to be fitted to the company's existing fleet of 747 aircraft. The order for the other three sets of 747 galleys – worth about £$\frac{3}{4}$ million – was placed by the Boeing Aeroplane Company for fitting into aircraft being built for a Middle East airline. Boeing 747 galley equipment is also being supplied by Taylor's to South African Airways and Singapore International Airlines, as well as to British Airways. Forty-five of the world's major airlines have now ordered Taylor galley equipment.

In the jaws of a forging manipulator!



Mobile forging manipulator from a new range introduced by Wellman Machines Ltd., Darlaston, Staffs. Hydraulic drive has been fitted to the front wheels of the manipulator giving maximum traction at all times, since heavier loads being handled in the jaws impose greater loads on the front wheels. The hydraulic circuitry of the front wheel drive gives full manoeuvrability, enabling the machine to turn about the centre of the front axle. The manipulators cover capacities from half to 25 tonnes laden weight and are available either electrically-hydraulically or diesel-hydraulically powered.

Britain

Education in marketing

Invention, design and technical and manufacturing expertise can yield the most ingenious products but, unless there is a need or desire for such goods and they are made known to and reach the right markets, the whole manufacturing operation can be a costly waste of time and effort for the manufacturer. Whether fairly or not, Britain has suffered to some extent in the past from unfavourable comparison with other manufacturing nations – United States, West Germany and Japan, to mention a notable three – in her ability to market her goods. Yet, within the United Kingdom, there exists an organisation which claims to be the largest professional marketing body in Europe and one of the largest in the world.

Although much of the modern theory of marketing emanates from the United States, the British Institute of Marketing considers that it is the world's leading professional organisation in this sphere. It has a membership of more than 16,500 and there are a further 16,000 registered students preparing themselves for the IM examinations. The Institute is currently in the process of introducing new certificate and diploma examinations which allow for recent changes in marketing practice, meet the requirements of a rapidly evolving further education system and, it is hoped, will further enhance the value placed on the qualifications by employers.

The Institute of Marketing, as such, has been in existence since only 1967, but the body had previously been operating – since 1960 – as the Institute of Marketing and Sales Management, an organisation which was itself a successor to the Incorporated Sales Managers' Association, formed in 1911. The present title has been adopted to emphasise that its interests have grown to embrace the whole area of activities involved in the conception of marketing and are not limited to just the techniques of selling. The Duke of Edinburgh is Patron of the Institute and its President is Sir John Hamilton.

A basic purpose of the IM is to develop the body of knowledge about marketing and to extend and expand an awareness and appreciation of marketing throughout industry. But what is marketing? There are many who still regard it as a sophisticated alternative appellation for selling. A definition put forward by the IM is: 'Marketing is the management function which organises and directs all those business activities involved in assessing and converting purchasing power into effective demand for a specific product or service, and in moving the product or service to the final consumer or user, so as to achieve the profit target or other objectives set by a company'. A shorter description is: 'Marketing is the management process which identifies, anticipates and supplies customer requirements efficiently and profitably'.

Under the guidance of its present energetic director general, Peter Blood, the IM has been making considerable progress in recent years towards achieving its aims in extending true appreciation of the marketing concept and encouraging effective application of good marketing methods, and practices. There is, however, no attitude of complacency among the staff, for they feel there is still much to be done. Mr. Blood believes that, in some areas of Britain industry, there is still too much 'lip service' only paid to marketing. Even where companies have a 'marketing manager' the title is sometimes granted with little or no true conception or regard for what such a position should embrace.

While many a managing director would postulate that the main purpose of business is to make a profit, Mr. Blood contends that it is 'to secure and keep customers, and then to keep them happy'. With customers and good management, profits should be a corollary but, without customers, there is no business, let alone profits.

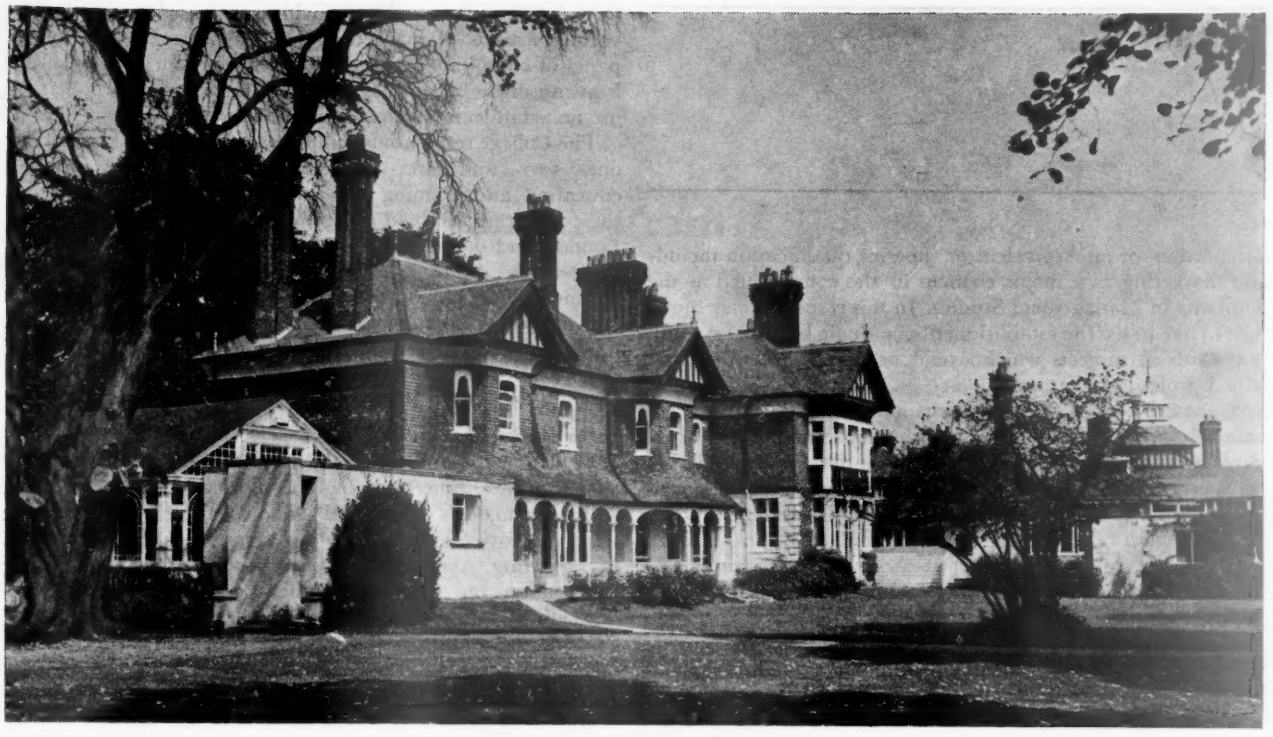
Peter Blood has been with the IM since September 1971, when he joined as director of marketing services. In July 1972 he succeeded Sir John Hamilton as director general. During 12 years prior to joining the IM, and after serving for five years with the Foreign Office, he had founded and become managing director of a nationally known company in the lighting, acoustics and air conditioning field, a company in garden and hand tools and cutlery, and a company designing, manufacturing and installing industrial and pharmaceutical clean rooms. He also became vice-chairman and group marketing director of the parent group.

Mr. Blood sees the IM as a meeting point, a forum, through which knowledge and an awareness of marketing can be developed. In pursuing this task from the Institute's headquarters at Moor Hall in Cookham, Berkshire, the director general has a staff of about 55. Throughout the country there are about 40 branches which have representatives on a national council of about 50 strong which normally meets four times a year. From this national council come the 12 members of the national executive committee, which meets every month.

In addition to the geographically located branches, the Institute has industry groups or divisions, so that marketing people within an industry can exchange ideas and views and promote the theory and application of marketing in that particular industry. To date, there are four of these divisions, covering the construction, travel, transport and distribution and hotel industries.

Mention has already been made of the certificate and diploma examinations. These examinations, together with the organising of the courses held to prepare students for them, form one of the three main services provided through the headquarters organisation of the Institute. The other two major services are programmes of post-experience residential and non-residential courses and seminars, which are available to non-members as well as members, and the extensive information and library services.

Phasing in of the new qualifying certificate and diploma examinations began in 1973 and will continue through to 1975 under the guidance of Ted Jenner, the director of diploma studies: it is intended to hold the first of the new diploma examinations in 1976. With the rapid changes taking place in marketing techniques and their application, it was felt that the training and examinations for the diploma should give more emphasis to the practical aspects and that they should also take into account the fact that increasing numbers of market-



Part of the Moor Hall headquarters buildings of the Institute of Marketing at Cookham, Berkshire.

ing people were reaching the highest echelons of industry and commerce – the board of directors. The present syllabus was introduced in 1960.

Under the new scheme, the qualifying certificate is essentially concerned with the theory of marketing. To prepare students for the examinations, there is a two-year part-time course divided into Parts I and II, covering basic concepts and knowledge. Subjects covered by Part I include fundamentals of marketing, economics for marketing, business organisation and elements of statistics: those subjects included in Part II are practice of marketing, legal aspects of marketing, be-behavioural aspects of marketing and financial and management accounting.

The certificate provides evidence of the acquisition of a fundamental and broad understanding of the significance of the marketing concept in the professional management of national, industrial and commercial organisations. In certain circumstances, the certificates may be used for entry into Institute membership. To gain registration for the two-year course, applicants must be at least 18 years of age and have at least five ordinary level passes of the General Certificate of Education, although those of 25 and over may be admitted as a student if they are employed full-time and have sufficient practical experience in sales, advertising, marketing research or another marketing activity. The conditions of registration may be waived in the case of serving members of HM Forces.

Preparation for the diploma, or final examination, is a one-year course and the work is of degree standard; it is based on a restructuring of the Part III of the previous scheme. This examination is concerned with the application by the candidate of basic principles to marketing situations in practice, emphasis being given to the global application of marketing skills. The four examination papers cover the international aspects of marketing, marketing planning and controls, management organisation and communications, and marketing analysis and decision. In the marketing analysis and decision section students are given specially-selected case projects to carry through in which the circumstances and situations may be varied near the final stage to test fully the student's appreciation of all the considerations to be taken into account when making marketing decisions. The success rate in the diploma examinations is about 50 per cent and even successful students will not be granted the diploma until they have satisfied the Institute that they have completed at least one year's full-time practical experience in a marketing post, making the diploma, by definition, a post-experience marketing qualification.

Entry to the diploma examination is to be confined to those who reach sufficient measure of success in the qualifying certificate examination or those who possess a Higher National Certificate or Diploma in Business Studies with a marketing

Peter Blood (right), director general of the Institute of Marketing, discusses aspects of the Institute's new examination syllabus with Ted Jenner, the director of diploma studies.

orientation, or an equivalent or superior qualification including marketing as a major element in the course, such as the Diploma in Management Studies. In this respect, Peter Blood would like to see the establishment of a single body to establish standards in subjects which would be acceptable to various allied professional organisations.

Since 1960, when the present examinations were introduced, more than 5,000 men and women have passed the Institute's diploma examination. It is expected that the new examination will accelerate this output at higher, more clearly defined levels of performance. The Institute is working towards the day when the possession of the diploma is the standard means of entry to full membership of the IM; at present membership is also open to those without the diploma but who have reached a position of management in a marketing function.

Well over 100 polytechnics and technical colleges provide tuition for the IM certificate and diploma examinations and there are also correspondence schools approved by the IM. Examinations are staged at about 40 centres in the UK, but arrangements are also made, where numbers are sufficient, for students to sit the examinations in overseas countries. Each year about 6,000 students sit the IM examination.

Although the IM considers that there is still much headway to be made in persuading industry to appreciate the value of having staff fully versed and educated in modern marketing methods and techniques, it is meeting with encouraging response from some companies, particularly among the larger industrial concerns. This is apparent in various ways. British Leyland, for example, has co-operated in arranging for members of its staff to attend special full-time block release courses at the Blackburn College of Technology, while Wilkinsons' is showing preference in advertisements for marketing staff for people with the IM diploma. ICI has encouraged its young marketing executives to sit the Institute examinations, and it was an ICI executive who won the Institute's travelling scholarship in 1973.

Post-experience training

Apart from the certificate and diploma courses and examinations, the Institute also organises an extensive programme in post-experience marketing training. These courses and seminars are arranged through the College of the Institute of Marketing. In charge of the College at present is Donald Membery, head of education administration.

The post-experience training is conducted at three levels – marketing management aspects in general by means of short residential courses and seminars; marketing management for particular industries arranged through the Institute's industry marketing groups division, and marketing management courses for particular companies by Marketing Training Ltd., the in-company training division which structures and conducts individually-tailored marketing training programmes for client companies.

At Moor Hall, Cookham, the Institute has its own residential college with 76 single bedrooms. For 46 weeks a year there are two courses a week being held at Moor Hall, each usually of about five days' duration. The prospectus is varied each year, the number of different courses in any one year ranging from 15 to 20. New courses are always being added to the selection, which is varied to meet the needs of different levels of executive and to provide specialised knowledge on various aspects of marketing. Lecturers are chosen from a panel of consultants and practising businessmen; the College is aware of the danger of too much theory and so prefers to use non-staff lecturers and course directors.

The College residential facilities are also used for some of the one-, two-, and three-day seminars, promoted by the IM education and training division, although the majority of these seminars are held at other venues, usually at hotels in London and other cities. Longer courses, of up to two- and three-weeks' duration, addressed by international marketing authorities, are also arranged, mostly at universities during vacation time. Some of the courses organised by the IM are invisible export earners for Britain, attracting delegates from other countries.

Information services

The Information Services Division of the Institute is in the charge of Mrs. Jane Monnington, information services officer. This division deals with a total of about 10,000 inquiries a year. Practical advice and information is supplied on every aspect of marketing. About 40 per cent of the inquirers are seeking information on practical applications and techniques in marketing. A further 25 per cent are wanting market intelligence. Those wanting information on IM member services and facilities form another substantial proportion of the users of the service. Details of non-IM courses in marketing subjects and also of marketing consultants and services are among requests made of the department, which maintains an extensive library and a bank of articles, surveys, reports and other appropriate information.

There are also two monthly magazines – *Marketing*, which is a forum for discussion of marketing views and ideas and is issued free to members and, *Marketing Forum*, which is supplied every other month to registered students.

First chair in marketing

Another achievement of the IM in the field of education is the sponsoring in 1965 of the first chair in marketing in a British university: this is established at Lancaster and has set the running for other universities, there now being about seven such chairs in existence in the UK.

Apart from its work in the education and information spheres, the Institute is also active in other directions. It was instrumental in the creation of the informal Council of Marketing Organisations, aimed at bringing together bodies in the marketing and advertising fields. The European Marketing Council, with 14 member countries, was formed in the 1950s with the Institute as a founder member, and this Council provides a base for the development of the IM's interests in EEC marketing activities and resulted in the European Marketing Congress being held in London last year.

The Institute, a self-funding body, is continuing to work towards other targets. It would, for example, like to see greater co-operation between the IM, industry and Government in promoting a wider appreciation of the complete marketing concept, of extending and improving the education facilities needed to make full use of modern marketing techniques and knowledge, and to persuade industry and commerce generally to apply those techniques with personnel adequately trained to put them into effect.

Some indication of the success already achieved by the Institute can be measured by the increasing proportion of members who reach board level. A survey carried out in 1969 showed that about 31 per cent of members were at board level as managing, marketing or commercial directors, and the proportion is believed to have grown even larger since that time.

Home News

Applications for investment grant

The Department of Industry has accepted since 1 July 1974 applications for investment grant in respect of capital expenditure incurred in the period 1 January to 31 March 1974. Such applications have been payable from 1 July 1974.

The Department now announces that applications in respect of the following quarter 1 April to 30 June 1974 will be accepted from 1 October 1974 and that payment on such applications, after approval, will begin from that date.

Investment grant is payable on expenditure incurred after 26 October 1970 only where it arises under a contract entered into by that date. Applications should be made to the Department on the appropriate form, accompanied by form IG/32 (or form IG/33 for ships) and relevant evidence of contract.

Closing dates

The Department reminds applicants that, by virtue of the Investment Grants Termination (No. 3) Order 1973 and of the Direction made under it on 2 April 1973, no investment grant will be made in respect of expenditure incurred in the period 1 January to 31 March 1973 unless application on the appropriate form and accompanied by a report by an independent accountant is made to the Department of Industry before 1 October 1974. Applicants should ensure that they have duly completed the appropriate form and forwarded it to the reporting accountant in sufficient time to enable him to examine and report on it and for the documents to be received by one of the Grants Offices not later than 30 September 1974.

By virtue of the Investment Grants Termination (No. 4) Order 1974 and of the Direction made under it on 6 May 1974 applications relating to expenditure incurred during the following periods should be made by the dates specified:

Expenditure incurred	Date before which application must be made
1 April 1973-30 June 1973	1 January 1975
1 July 1973-30 September 1973	1 April 1975
1 October 1973-31 December 1973	1 July 1975
1 January 1974-31 March 1974	1 October 1975

Firms contemplating applying for investment grants towards expenditure incurred on the production of prototypes must also comply with all the requirements as to the making of applications by specified terminal dates. Special considerations may affect this type of application and if firms foresee difficulty in meeting these requirements they should seek guidance from the appropriate office.

Regional development grants

Regional development grants will not be paid on expenditure towards which an investment grant has been made. However, application for a regional development grant on assets provided on or after 22 March 1972 may be made towards capital expenditure on new machinery or plant in development areas defrayed after 21 March 1972 on which application for investment grant is not being made, even though the expenditure relates to an asset towards some expenditure on which an investment grant has been made.

Guidance on the preparation of forms may be obtained from the appropriate Office. The addresses of the Offices are: Department of Industry, Regional Development Grants Office,

Queensway House,
West Precinct,
Town Centre,
Billingham,
Cleveland TS23 2NF
Tel. (0642) 553671
Telex 58608

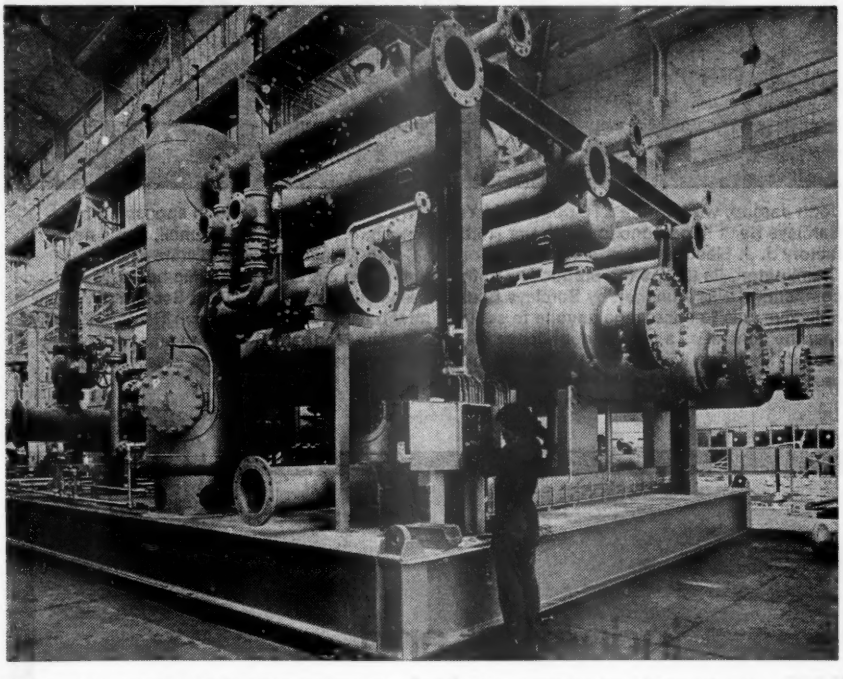
St. Peter's House,
Stanley Precinct,
Bootle,
Lancs. L20 3LZ
Tel. 051-922 4030
Telex 627162

24/26 Newport Road,
Cardiff CF2 1SY
Tel. (0222) 42611
Telex 49538

Magnet House,
Waterloo Street,
Glasgow G2 7BT
Tel. 041-221 9833
Telex 77611

and (for ships and computers only)

Department of Industry,
Investment Grants Office,
Colman House,
Victoria Avenue,
Southend-on-Sea SS2 6DU
Tel. (0702) 41341 and 41362
Telex 99288



Cooler skid, part of a £2.5 million compression module for a production platform in the North Sea Piper Field. The module was built for Bechtal International Ltd. by Ingersoll Rand Ltd. at Wythenshawe, Manchester. The system consists of a number of gas turbine driven multi-stage centrifugal compressors followed by electric motor driven reciprocating compressors. The picture shows the turbine inlet and discharge side of the cooler skid.

New industry for Hirwaun

The vacant Department of Industry 12,000 sq. ft. factory at the Hirwaun Trading Estate, formerly occupied by Morgan and Brace Ltd., has been allocated to Harefield Rubber Co. of Harefield, Middlesex. The company manufacture industrial rubber and allied products including a re-covering service for industrial rollers, and occupation of the factory will enable Harefield Rubber to offer a better service to the British Steel Corporation and other customers in South Wales.

Employment will be provided initially for 15 people and eventually it is anticipated that the company will employ 41, the majority men. It is expected to start production in early or mid-October.

25,000 inquirers helped by Small Firms Information Centre network

25,000 inquirers have been helped by the Small Firms Information Centre network since it was established last year. Greeting the 25,000th client in the Glasgow Centre on 27 August, Gregor MacKenzie, Minister with special responsibility for small firms at the Department of Industry, said:

'I am pleased that so many businessmen and women – and those thinking of setting up a business – have made use of our 10 Centres across Britain. Through the Centre Managers they provide Government with a feed-back of information on what matters to owners of small firms, and I am impressed with the genuine concern expressed by this sector on central policies affecting it.

'Eight thousand have inquired about starting a new business, which must be given every encouragement, because of the enormously important contribution, recognised by the Government, which enterprising small firms make to the wealth of this country.

'The first 25,000 clients represent some 50,000 separate inquiries, and the rate of inquiries received is increasing all the time. This tremendous response to the services which the Centres can provide will, I am sure, lead to an even more enterprising, responsible and healthy private sector.'

The first Small Firms Information Centre was officially opened in Newcastle on 23 July 1973 and all Centres were operational, mainly in temporary premises, by November 1973. They were set up as a result of the Bolton Committee of Inquiry recommendation that an information service should be provided to make full use of sources to helpful advice.

The Centres give free sign-posting help on all aspects of business management including financial and official matters. There are centres at: Glasgow, London, Cardiff, Birmingham, Bristol, Leeds, Luton, Manchester, Newcastle and Nottingham.

The 25,000 inquirer was a Glasgow businessman, Leslie Lawson, managing director of Rally Klad Ltd., manufacturers of car seat covers, sportswear and kilts, skirts and dresses in tartans and tweeds. The firm was started by four brothers in 1942 and with about 12 employees began producing car seat covers. The range of products was expanded when another company, which was about to close down, was taken over. The present work force is 60.

Mr. Lawson, who received the VIP treatment from the Minister, visited the centre to obtain guidance on foreign currency rates. To mark the occasion he was handed a commemorative scroll by Gregor MacKenzie. The present Glasgow centre was opened on 21 June and is currently handling about 100 inquiries a week.

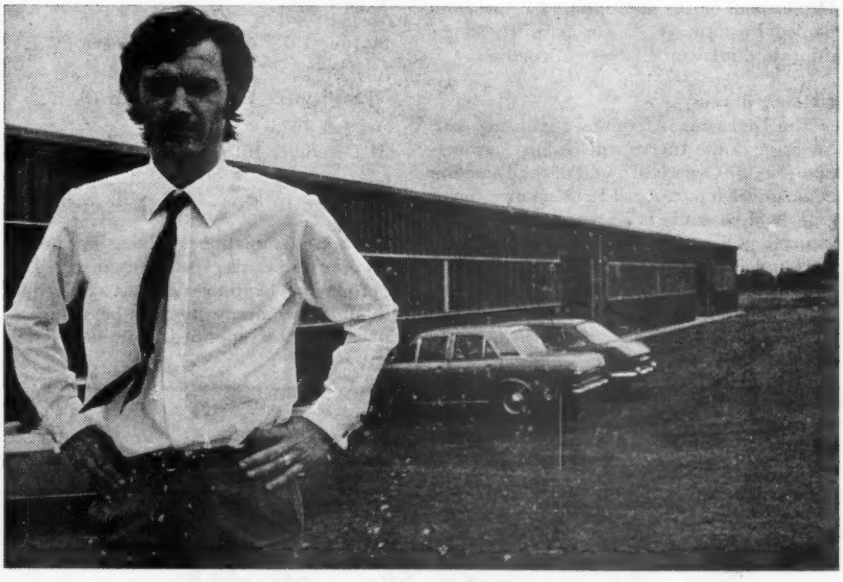
Between 60 and 70 per cent of Rally Klad's business is now for export. Mr. Lawson said that his company had received a lot of help from Government agencies in the past, which had contributed in particular to its success in building up its overseas business.

Expansion at Doncaster

Councillor M. C. Welsh, chairman of the Doncaster Metropolitan Borough Council's Industrial Development Sub-Committee, has announced that Quaker Oats Ltd., the well known breakfast cereal, pasta, spreads and pet food manufacturers with headquarters at Southall, Middlesex, are currently considering the purchase of 36 acres of land for a future expansion at Sandall Grove on the Kirk Sandall Industrial Estate, Doncaster.

Quaker's envisage that the initial phase of this proposed expansion could provide employment for about 100 people, nearly all of whom would be recruited from the Doncaster area. A steady expansion in the number of people required is expected over the next 10 years consistent with projected favourable market conditions for Quaker's range of products.

Councillor Welsh said that this was potentially the largest development that had been attracted to the Doncaster area since the post-war period and, provided the present uncertainties in the economic climate were resolved, the project was intended to expand rapidly and could eventually increase by several times the initial jobs content, mostly male, with further room for expansion. The initial phase, which it was hoped to complete by early 1976, would be 50,000 sq. ft. and the layout was planned to enable future utilisation of the whole of this 36-acre site. To appreciate the full potential of this project a comparison should be made with the company's existing works where on 16 acres 1,000 people were employed.



John Jessop, winner of a £10,000 'Build Your Own Business' competition sponsored by Barclays Bank in conjunction with the North of England Development Council, at his new factory J. J. Electronic Components Ltd., on the South Nelson Industrial Estate at Cramlington. Its field is the production of thick film micro circuits on ceramic bases. The competition was launched by Barclays Bank in association with NEDC last September. Its objective was to encourage anyone to set up a new business in the Northern Region. Barclays saw the contest as a vote of confidence recognising the Northern Region as an excellent growth area. The NEDC took the opportunity to encourage businessmen to assess the assets and advantages of the Region.

Advertising in 'Trade and Industry'

Inquiries about advertising in *Trade and Industry* should be addressed to HMSO, Room C70, Atlantic House, Holborn Viaduct, London EC1P 1BN. (Tel. 01-248 9876, ext. 6147).

New breathing apparatus certification scheme

A scheme for the certification of breathing apparatus to a standard acceptable for its use in mines, factories, ships and by fire services came into operation on 1 September. The scheme is detailed in a joint testing memorandum entitled 'Certification of Breathing Apparatus', agreed by the Departments of Energy, Employment and Trade and the Home Office, and issued by the Department of Energy.

The scheme harmonises the standards of the Departments of Energy and Employment, which are statutory approval authorities for breathing apparatus used in mines and factories; the Department of Trade, which is concerned with apparatus used in ships; and the Home Office, which recommends specifications for adoption by fire services.

The Safety and Health Division of the Department of Energy has become the overall certifying authority. Certificates of Assurance issued by the certifying authority will be acceptable to the four Departments as evidence of the compliance of apparatus with their technical requirements. The Certificate of Assurance will not, itself, signify statutory approval since approval authorities may impose additional conditions depending on specific circumstances of use.

Copies of the Memorandum, which contains the procedure for certification and is now being printed, can be obtained from: Safety and Health Division, Department of Energy, Thames House South, Millbank, London SW1.

Casualties to Vessels and Accidents to Men: Return for 1972

The *Casualties to Vessels and Accidents to Men Return for 1972* was published on 29 August and is available from HM Stationery Office and Government Bookshops price 50p net (55p by post).

As well as tables dealing with casualties to merchant vessels and accidents to merchant seamen, the 1972 Return contains data dealing with casualties to deep sea trawlers hitherto published separately.

The deep sea trawler casualty data is published in response to one of the recommendations of the Holland-Martin Report (Cmnd. 4114).

It has been decided that in future the Annual Return, which had previously dealt mainly with casualties to merchant vessels, shall include a separate section dealing in detail with fishing vessel casualties.

Patents endorsed 'Licences of Right'

Under Section 35 of the Patents Act, 1949 the following patents were endorsed 'Licences of Right' on the dates specified:

Number	Grantee	Subject-matter
29 July 1974		
1,176,778	Standard Telephones and Cables Ltd.	Character generation system
878,441	Brown, Boveri & Co. Ltd.	Method of treating the surface of semiconductor elements
1,068,978	Brown, Boveri & Co. Ltd.	Process for increasing the reverse voltage of thermally oxidised silicon members with at least one barrier layer
1,164,551	Brown, Boveri & Co. Ltd.	Semiconductor device
1,220,315	Brown, Boveri & Co. Ltd.	Semiconductor device
1,268,102	Brown, Boveri & Co. Ltd.	A semiconductor diode
5 August 1974		
1,241,480	Societa' Italiana Resine S.I.R. SpA (formerly Societa' Italiana Resine SpA)	Method of preparing supported oxidation catalysts for producing ethylene oxide
1,242,464	Societa' Italiana Resine S.I.R. SpA (formerly Societa' Italiana Resine SpA)	Process for preparing acrylic or methacrylic acid
1,243,105	Societa' Italiana Resine S.I.R. SpA (formerly Societa' Italiana Resine SpA)	Method of preparing supported oxidation catalysts for producing ethylene oxide
1,246,399	Societa' Italiana Resine S.I.R. SpA (formerly Societa' Italiana Resine SpA)	Process for the production of vinyl acetate from ethylene
1,247,603	Societa' Italiana Resine S.I.R. SpA (formerly Societa' Italiana Resine SpA)	Separation of synthetic rubbers
1,257,724	Societa' Italiana Resine S.I.R. SpA (formerly Societa' Italiana Resine SpA)	Process for preparing expandable thermoplastic compositions
1,248,010	Societa' Italiana Resine S.I.R. SpA (formerly Societa' Italiana Resine SpA)	Process for preparing vinyl acetate
6 August 1974		
1,263,594	Societa' Italiana Resine S.I.R. SpA (formerly Societa' Italiana Resine SpA)	Method of preparing supported oxidation catalysts for producing ethylene oxide
1,271,884	Societa' Italiana Resine S.I.R. SpA (formerly Societa' Italiana Resine SpA)	Process for the production of ferric oxide, sulphuric acid and sulphur dioxide from ferrous sulphate
1,278,165	Societa' Italiana Resine S.I.R. SpA (formerly Societa' Italiana Resine SpA)	A flash desalination evaporator
1,281,843	Societa' Italiana Resine S.I.R. SpA (formerly Societa' Italiana Resine SpA)	Process for preparing ethylene polymers
1,282,673	Societa' Italiana Resine S.I.R. SpA (formerly Societa' Italiana Resine SpA)	A flash desalination evaporator
1,289,642	Societa' Italiana Resine S.I.R. SpA (formerly Societa' Italiana Resine SpA)	A flash desalination evaporator
1,299,200	Societa' Italiana Resine S.I.R. SpA (formerly Societa' Italiana Resine SpA)	Non-woven fabrics
7 August 1974		
1,018,039	Societe Anonyme Automobiles Citroen (formerly Societe Anonyme Andre Citroen)	Internal shoe drum brakes
1,175,727	Martin Howlett	Animal feeding devices
1,215,426	Institut Textile De France	Yarn feeder for a knitting machine
1,236,259	Maschinerfabrik Winkler, Fallert & Co.	Inking mechanisms for printing presses
1,240,460	Agfa-Gevaert (formerly Gevaert-Agfa NV)	Production of photographic silver halide emulsions
1,281,339	Hawker Siddeley Dynamics Ltd.	Measurement of twist in rotating shafts
1,145,219	International Standard Electric Corporation	Automatic telephone exchange
1,295,567	International Standard Electric Corporation	Pal switch and colour killer
1,257,909	ITT Industrial Inc.	Integrated circuit
9 August 1974		
1,093,997	Nichiban Co. Ltd. (formerly Sachiko Kojima)	Apparatus for delivery and automatic cutting of tapes
1,110,200	Agfa-Gevaert Aktiengesellschaft	Photographic camera with a device for advancing a rotary multiple photoflash lamp assembly
1,217,624	FFSA	Compression-ignition internal-combustion engines
1,221,531	FFSA	Fuel injection systems on internal combustion engines
1,232,281	Co-operative Industries Inc.	Hose fittings
1,242,485	Co-operative Industries Inc.	Tool for attaching an end fitting
1,256,025	Agfa-Gevaert Aktiengesellschaft	Photographic layers which contain UV-absorbers
1,289,348	Standard Telephones and Cables Ltd.	Signalling systems
21 August 1974		
1,212,994	Agfa-Gevaert (formerly known as Gevaert Agfa NV)	Method of development processing heat-sensitive recording material
1,248,036	Agfa-Gevaert (formerly known as Gevaert Agfa NV)	Photopolymerisation of ethylenically unsaturated organic compounds
1,283,038	Agfa-Gevaert (formerly known as Gevaert Agfa NV)	Photosensitive recording material containing lead iodide or lead bromide
1,283,533	Agfa-Gevaert (formerly known as Gevaert Agfa NV)	Process of obtaining print-out images using photosensitive lead oxide
1,283,534	Agfa-Gevaert (formerly known as Gevaert Agfa NV)	Improved photographic material containing lead (II) oxide
1,283,697	Agfa-Gevaert (formerly known as Gevaert Agfa NV)	Improved light-sensitive recording material containing lead iodide and or lead bromide
1,293,026	Agfa-Gevaert (formerly known as Gevaert Agfa NV)	Photosensitive polymer layers
1,293,133	Agfa-Gevaert (formerly known as Gevaert Agfa NV)	Pressure-activatable image formation

Any person who claims that the patentee at the time of endorsement of any of the above Patents was precluded by a contract in which claimant is interested from granting licences under the patents may apply for cancellation of the endorsement on Patents Form No. 45 within two months after the date of endorsement.

E. Armitage
Comptroller

Insurance Companies Act 1974

The Insurance Companies Act 1974 came into operation on 31 August.

The new Act is purely a consolidating measure, and no change in the law results from it.

It brings together the insurance supervisory provisions of the Insurance Companies Act 1958, Part II of the Companies Act 1967, and the Insurance Companies Amendment Act 1973. But these three enactments are not completely repealed, since a few, generally minor provisions, not connected with insurance supervisory matters have not been consolidated. These are detailed in Annex I.

Under Section 88(3) of the new Act, all requirements, Orders, notices, etc., currently in force under the 1958, 1967 and 1973 Acts will continue to have effect as if made under the corresponding provisions of the new Act.

Owing to printing difficulties, copies of the new Act are not yet available.

ANNEX 1 Insurance Companies Act 1974 non-consolidated provisions not being repealed

Although the 1974 Act is intended to consolidate the 1958 Act, Part II of the 1967 Act and the 1973 Act, its long title includes the words 'An Act to consolidate, with certain exceptions. . . .' and Schedule 2 indicates that certain provisions are not being repealed. The excepted provisions – those which are neither being consolidated nor repealed – are as follows:

1958 Act	1967 Act	1973 Act
S. 19(1)	Ss. 60(3), 86, 87, 96, 97 & 99	S. 50
S. 20	(As amended by Sch. 1 to the 1974 Act)	S. 51
S. 34	Ss. 89, 90 & 91	S. 54(1) & paras. 15-17 of Sch. 1
S. 36(4) (5) & (7)	S. 102(2) (definition of 'director')	S. 56 & Schs. 3-5
S. 37(1) & (3)	S. 102(3) & (4)	S. 57(1)
	S. 107	
	S. 108	

Clearance of merger proposals

Shirley Williams, Secretary of State for Prices and Consumer Protection, had decided, on the information at present before her, not to refer the following proposed mergers to the Monopolies and Mergers Commission under the provisions of the Fair Trading Act 1973:

1 BBC, Brown, Boveri and Co. Ltd., of Baden, Switzerland/George Kent Ltd. (other than their scientific and medical instruments interests).

2 The General Electric Co. Ltd.; and the Rank Organisation Ltd./George Kent Ltd.

3 Total Oil Great Britain Ltd. and Arco Petroleum Ltd.

Red Rovers (Car Recovery Services) Ltd.

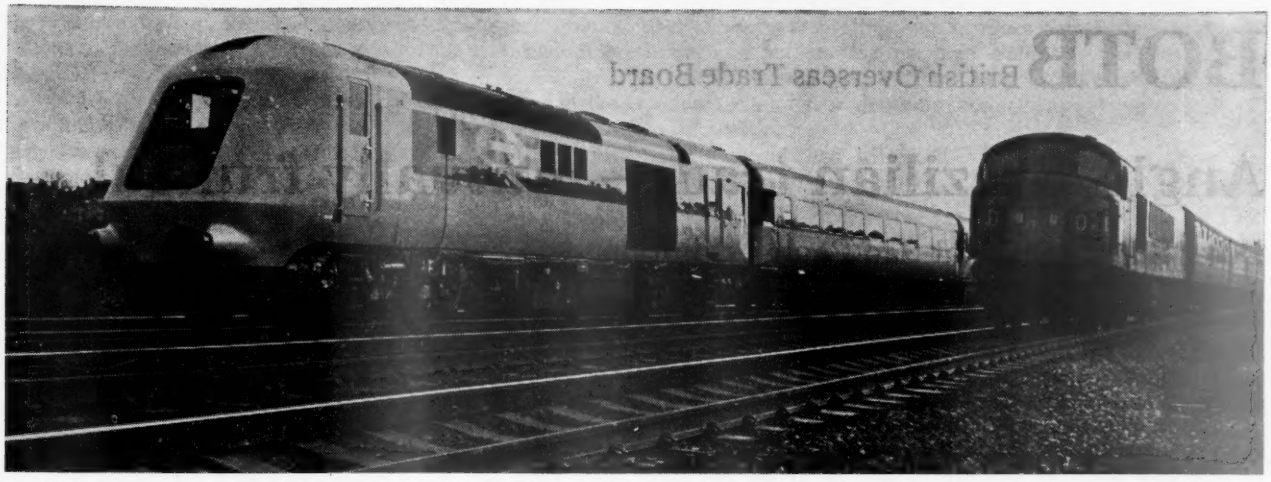
On 22 August upon the Attorney General's application, an interlocutory injunction was granted in the High Court prohibiting Red Rovers (Car Recovery Services) Ltd., 47 Oxford Street, Daventry, Northants, from entering into certain life membership contracts in regard to their car recovery service.

On 28 August, in the High Court, the company undertook not to accept any new members, either on a life or annual basis, or to effect any renewal of membership, until a full hearing on the case takes place on 11 September.

ANNEX 2 Insurance Companies Act 1974, 'Conversion table' of the main provisions from previous Acts

	Existing Sections immediately prior to new Act			New Sections
	1958	1967	1973	1974
INTERVENTION				
Grounds for invoking powers			12	28
'Restriction'			13	29
Investment limitation			14	30
Maintenance of assets			15	31
Custody/Trusteeship of Assets			16	32
Limiting premium income			17	33
Special acturial valuation			18	34
Reducing six months' period for deposit of returns			19	35
Requiring special information/ Inspection			20	36
Residual power			21	37
Notice of restriction			22	38
Notice of restriction through unfitness of director/manager			23	39
Rescission, variation and publication			24	40
Power of S. of S. to bring civil proceedings			25	41
ANNUAL RETURNS				
Preparation of B/S, P/L a/c and Rev. a/c.	4(1)-(4)	71(1)	—	13
Actuarial Valuation and Statement	5	78	3(1)-(4)	14
Appointment of Actuary			3(5) & (6)	15
Statements of Business (All Sch. 3/1968 Returns)	7(1)	74		16
Audit	9	72(1)		17
Deposit of returns with DOT	8	75	4	18 & 19(1)
Deposit of returns with CRO			36	55
Confidentiality of documents		76	36(3)	19(2) & 55(3)
AUTHORISATION				
Bodies entitled to c.o. business in Great Britain		60		2
Automatic authorisation by the Act		61(1)		3(1) (a)
Individual authorisation by the DOT		61(2)		3(1) (b)
Initial capital		62(1)		5
Initial 'solvency margin'		62		4
Power to amend initial capital and 'solvency margin'			1 & 32(3)	10
Adequacy of reinsurance		63		6
'Fitness' of persons associated		—	2	7
Limited authorisations		62(5) & 67		8
Revocation of authorisation		69		9
Definitions of classes of business		59*		83
Business incidental to business of another class		94*		84
PROTECTION OF LONG-TERM POLICYHOLDERS				
Identification/separation of assets			7	23
Application of assets			8	24
Allocations to policyholders			9	25
Restriction on transactions with connected persons			10	26
MISCELLANEOUS				
Solvency margin and power to change	13	62 & 79(1)	28 & 32(3)	44 & 58
Changes of controllers, directors or managers		82 & 83	33-35	52-54
Annual Report		98		87
Power to treat general business as OLT and vice-versa			37	56
Modification power			38	57
Lloyd's returns	6			74
Requirements for Lloyd's Underwriters	Sch. 1			73
Interpretation	33	102	55	85
REGULATION-MAKING POWERS NOT REFERRED TO ABOVE				
Quarterly returns			5	21
Undesirable transactions			6	22
Avoidance of contracts for unlimited amounts			11	27
Winding-up Rules			29(4)	51(1)
Winding-up Rules (long-term business)			30(5)	51(2)
Valuation regulations			32(1), (2) & (4)	78
Advertisements			41	62
Intermediaries in insurance transactions			43	64
Statutory Notice – OLT business			44	65
Linked long-term policies			47	68

* As amended/affected by Articles 2, 3 and 7 of the Hovercraft (Application of Enactments) Order 1972 (S.I. 1972/971).



British Rail's prototype 125 mph high speed train – seen alongside a conventional diesel hauled train – has successfully completed its 100,000 mile track trial programme. In November 1974 the train will enter passenger evaluation service with the Western Region of British Rail. The train consists of two streamlined driving/power cars, each with a 2,250 hp diesel engine, and seven new passenger coaches with 'air-cushion' suspension for quiet, smooth riding. The 67 tonne HST power cars at each end of the train will contain a centrally located ergonomically designed driver's control desk, a single Ruston Paxman 'Valenta' diesel engine and sufficient fuel for 1,000 miles. Automatic doors between coaches are operated by tread mats – convenient for luggage carrying passengers and catering staff.

First conciliation scheme for shops and shoppers

A new, and entirely impartial 'complaints' procedure has been set up to help trader and customer alike in the settling of shopping disputes. The new service was inaugurated on 2 September, in Croydon, London's largest borough with one of the most important shopping centres in the South East outside Central London. At a luncheon at the Fairfield Halls on 30 August, the Director General of Fair Trading, John Methven, announced the commencement of the new scheme. The Mayor of Croydon, Councillor Paul Rickards was the principal guest.

The Croydon Chamber of Commerce and Industry is the first association or organisation of any kind, not only to announce a Code of Practice for its members which has the support of the Office of Fair Trading, but also, and more importantly, to go further by publicly offering special conciliation facilities to both member-traders and their customers for dealing with disputes which arise from time to time, and which in the past have often resulted in unnecessary law suits or arbitration.

The main points of the Code and Conciliation Scheme, which are particularly welcomed by the Office of Fair Trading, are:

1 The facilities of the Conciliation Panel are entirely *free of charge* to members and consumers, and are also offered to non-member traders on payment of a small fee.

2 The recommendations of the Panel will be implemented by the members *within 14 days*.

3 The Code anticipates that the retailer is fully responsible for the quality of the goods he sells and that he should not mislead his customers by displaying notices such as 'No refunds', 'No goods exchanged'.

4 Recognising that many disputes arise through defensive handling by junior staff, the Code directs that only senior staff members should deal with customer complaints.

5 Advertisements which cannot be substantiated should not be displayed.

6 The Code outlaws all 'disclaimers' and 'weasel' words, such as 'worth', 'value', 'price elsewhere'.

7 Reports by the Conciliation Panel will be submitted to the Chamber's Executive Council regularly and published every quarter in the Press, the Chamber thus conducting its business quite openly.

Members of the general public will in most cases learn of the help offered by the Conciliation Panel through the existing channels of advice and help – Citizens' Advice Bureaux, welfare services and other consumer advice points around the borough.

Government Sales

Ministry of Defence

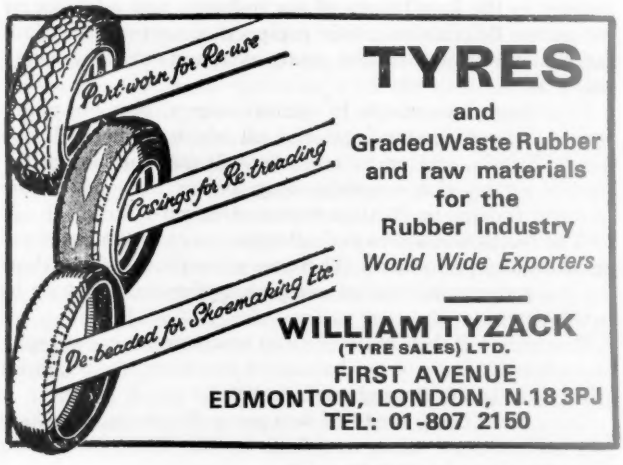
11 September 1974 Miscellaneous Stores

Location: Astoria, Roundhay Road, Leeds 8

Auctioneers: Bartle & Son (Dept. L), 52 Merrion Street, Leeds LS2 8JH (Tel: 0532 450898)

Industrial and garage plant and equipment, machine tools which include lathes, drilling, grinding, milling, shaping, etc., machines, compressors, fork lift truck, industrial tractors, gravity roller, welding and pneumatic equipment, MT spares, tyres, tools, lifting and towing equipment, batteries, vehicles, etc. Carpets, blankets, kit bags, camp equipment, greatcoats, battledress, pullovers, shirts, chairs, tables, wardrobes, bookcases, chests of drawers, filing cabinets and other household and office furniture. A large quantity of other miscellaneous stores.

Catalogues for the above sale, which give details of the lots, conditions of sale, viewing times, etc., are available from the auctioneer from two weeks before and up to the day of the sale, price 10p (postal orders only).



BOTB British Overseas Trade Board

Anglo-Brazilian trade – mutually fruitful

Peter Shore speaks at São Paulo exhibition

During his visit to Brazil, Peter Shore, Secretary of State for Trade, toured the British Industrial Exhibition in São Paulo and later made a speech referring, among other matters, to the development of trade between the two nations.

Delivering his address at a dinner on 27 August, Mr. Shore said: 'I am delighted to be able to visit Brazil only a few months after becoming Secretary of State for Trade. The pace of Brazil's economic advance has excited interest far afield and I gladly seized this chance of seeing a little of it at first hand. And of course it is a great pleasure to be here for the fourth, and biggest, British Industrial Exhibition to be held in Latin America. . . .

'Since the 1969 São Paulo Exhibition, trade between Britain and Brazil has trebled, so we can all have very high hopes for accelerated progress resulting from "SP 74".

The strength of British industry

'Those of you who visit the exhibition (23 August-1 September) will see for yourselves that British industry is a powerful force with a great deal to offer the rest of the world. Our achievements range from space satellites to the quiet engines of the RB 211, from a bicycle made entirely of carbon fibre to the advanced passenger train, from a tyre that can be driven at speed even after it has burst, to the supersonic Concorde. These and much more illustrate the leading role that Britain is playing in the most important sectors of advanced technology – including many of great interest to Brazil.

'In particular, "SP 74" gives a good idea of what Britain can provide in the way of capital goods. The exhibition brings together some 340 British companies displaying equipment ranging from nuclear plant to machine tools, locomotives, radar and a host of other plant, machinery, equipment, instruments and materials. In all we have on view 1,000 tons of British goods worth £1.25 million

'This exhibition is being staged at a time when British goods are strongly competitive and there is more room in our economy for exports.

'As a world trader Britain's economic prosperity has always depended on maintaining a vigorous export performance coupled with continued industrial innovation. The latest chapter in the long history of our industry, and a key factor enhancing Britain's economic prospects, concerns the exploitation of our offshore oil and gas reserves, and our other energy resources.

'Our large investments in nuclear energy, plus the major reserves of coal, natural gas and oil which lie beneath our feet in Britain, and under our seas, will make us one of the world's energy-rich countries long before the end of the century. Indeed, by 1980 we expect to be self-sufficient in oil.

'The North Sea is to us as challenging an environment as the Amazon Basin is to Brazil. There are great problems but these are being overcome and we are pushing forward fast with its development.

'Not only will these reserves mean an assured energy supply, and a massive boost to our balance of payments, but beneficial effects will be felt throughout industry.

'New life is being breathed into parts of our country where new industries are taking over from the old. They, like Britain itself, are on the verge of a new era. If economic history shows anything it is that the economic winners of the future are not necessarily the same as those of previous decades. Despite our short term problems, my conviction is that the pendulum is swinging back in Britain's favour.

'By themselves initiative and capacity for technological innovation are not enough to ensure vigorous economic advances. Good industrial relations are also vital. In this respect too Britain faces the future with more confidence than before. We are working towards a more effective relationship between Government, workers and management.

'By placing greater emphasis on partnerships we have already begun to create a new and better climate of opinion in industry. There is, moreover, a growing realisation in Britain that beating inflation must be among the top priorities of every person in the country.

'In Brazil you have succeeded in bringing down the annual rate of inflation over the past decade from an intolerable level to around 13 per cent last year. Your sophisticated system of monetary correction and indexing is properly attracting careful study in many countries. The set-back of the current year in no way detracts from your achievement. No country, as we certainly know, could hope to remain unaffected by the quadrupling of oil prices.

'Besides quickening inflation everywhere the escalation of oil prices has played the major part in creating massive balance of payments deficits in the importing countries. Like Brazil, we in Britain have recently experienced our largest ever trade deficit.

'Britain's non-oil deficit is moving in the right direction. It is down from a monthly average of £240 million in the last quarter of 1973 to £157 million in the quarter ending in July. Our exports have never been higher and they have been increasing faster than imports. Nevertheless we realise that more resources must be put into correcting the deficit and our policy is designed to achieve this.

'But the one thing we must avoid, and so must the other major oil importers, is to try now to close our oil deficits by piling further deflationary measures on top of the damage done to world trade by the oil price increases. By continuing to encourage a healthy growth rate, Brazil is clearly of the same opinion.

'None of us must seek to solve our balance of payments problems by inflicting economic damage on the rest of the world. Together with other members of OECD Britain recently declared that she would not take any unilateral action which could damage international trading relations.

Our objective: freeing world trade

'Free and expanding world trade must be our objective now more than ever, or there is the real risk of sinking back into protectionism and recession.

'As a world trader Britain will work towards this objective wherever we see an opportunity.

'In our re-negotiation of the terms of entry into the European Economic Community we are taking the view that the Community must become more outward-looking in its approach to trade and aid. Narrow regionalism is the last thing the world needs today.

'Among our re-negotiation objectives are radical changes in the Community's agricultural policy to allow more liberal treatment for food supplies from many countries, including Brazil.

'We are also looking for a substantial improvement in the Community's market organisation for beef which would also give reasonable access to imports from third countries. This matters to Brazil because of your developing production and trade in chilled beef.

'Whatever the results of these re-negotiations – and we cannot judge yet what the outcome will be – Britain will continue to satisfy customers and seek trading opportunities wherever they are to be found. Two-thirds of our trade is conducted outside the Community and we intend to strengthen our links with other countries and continents throughout the world. I was naturally pleased to see the three year trade agreement concluded between Brazil and the EEC with its aims of expanding trade between both markets.

New patterns in world trade

'When we consider the future, there is one thing we would do well to remember, there is no natural law that requires the world trade scene to be dominated by Western Europe, North America and Japan. Developing countries are increasingly, and rightly in my opinion, expanding their economies and expecting a larger share of the world market. They are gradually but surely moving away from being solely suppliers of raw materials and primary producers and are challenging the major industrial countries at their own game.

'This process is proceeding apace in Brazil. I would not venture a date but I am convinced that well within my political lifetime Brazil will have left the company of developing nations – and joined the ranks of the developed. Some of your large corporations are now themselves moving into investment abroad. And both São Paulo and Rio de Janeiro are becoming major world finance centres.

'The pattern of world trade is changing and will continue to change in the wake of the industrialisation programmes of developing countries. They, too, increasingly need a market for industrial goods as well as traditional primary products. As a world trader, Britain fully appreciates the need of these countries to trade. We have our eyes not only on the larger markets of today but on the potentially still larger and different markets of tomorrow. In working towards free trade I believe we must take full account of new and growing markets and of the justified expectations of the newly industrialised countries.

'One opportunity to do this will occur in the GATT multilateral trade negotiations later this year. I welcome the fact that Brazil is taking a lead in providing a positive voice for the developing nations in the negotiations, and has made proposals which reflect their needs. Britain for its part wholeheartedly supports the view that the negotations should take special account of the interests of developing countries and that they should get a better deal in future.

'Within the EEC we are pressing for improvements in the Community's generalised preference scheme. As a large importer from developing nations, Britain has long maintained liberal trading policies, with virtually no quantitative restrictions or other barriers against their products. Unhappily, our scheme was aligned last year with that of the Community. But we are not content and we are looking for further all round improvements in the terms. The progress made this year was welcome, but we still believe that a lot more can and should be done, particularly in the industrial sector and in its coverage of processed agricultural products. Neither are we happy about the Community's proposals for limiting benefits to the most advanced developing countries – which may affect Brazil – as we certainly do not want to see the scheme made more restrictive.

'Brazil's enormous industrial leap forward in recent years provides clear evidence of the changing pattern of world trade and of the new trading opportunities this presents both to Brazil and her trading partners. Following massive rises in industrial production, industry now accounts for about 35 per cent of your gross domestic products, surpassing acriculture in importance.

'The world has witnessed a remarkable expansion in Brazilian exports, particularly of manufactures, stimulated by such impressive trade fairs as 'Brazil-Export' held in Brussels at the end of last year. In line with the true spirit of two-way trade the size of your import market has more than trebled over the past five years. And as a world trader Brazil like Britain sees the importance of expanding trade links with countries throughout the world – and of not being over dependent on one or two particular markets.

'In Britain we have watched, impressed, the rapid growth of Brazil's economy in recent years, as a result of continuing developments in such fields as petrochemicals, transport, steel, electricity generation, as well as the exploitation of your mineral resources.

'We have played a part in this expansion and are sure that we have the capability to play an even bigger part in the future. I believe that Brazil's immense potential coupled with Britain's technology, industrial expertise and investment can lead to an increasingly fruitful partnership in the future. British skills played a major role in building the Rio Niteroi Bridge which was opened earlier this year. Only recently it was announced that Brazil is to set up its first national computer company in partnership with a British firm. Discussions are currently taking place between the United Kingdom Atomic Energy Authority and its Brazilian counterpart for a co-operation agreement.

Steel and hydro-electricity

'The areas where Britain and Brazil can work together are indeed many. Take the major development of Brazil's steel industry. Our own expansion programme for British steel incorporates the most up-to-date machinery and technology which could also benefit Brazil. The British Steel Corporation is about to set up an office in Brazil to offer technical and other services. I hope too that British industry will be able to play a part in the gigantic hydro-electric project at Itaipu. Then there are your plans for other hydro-electric and thermal power stations as well as a second nuclear power station. There is also continuing scope for co-operation in petrochemicals, in shipbuilding in various transport projects and mineral extraction.

'We understand very well that a country like Brazil, while a growing importer of industrial goods, wishes to build up increasingly its own nationally-based industries. This objective can be advanced by steadily increasing the proportion of locally manufactured content in industrial products and again in establishing in Brazil, plants jointly owned by Brazilian and British firms. . . .

'For some time Britain has held a substantial investment stake in your country and we are now your fifth biggest foreign investor. As for the future, I know that Brazil welcomes more investment, particularly in the capital goods sector, agriculture, food processing and mineral extraction and processing and British skill in other fields such as technical advice, engineering consultancy, financial and other services can increasingly contribute to Brazil's development.

'We in Britain, especially the firms represented at "SP 74", are fully aware that the world has as yet only glimpsed the potential of Brazil. Equally, we suspect that Brazil has yet to grasp the full range and strength of British industry. I am sure that partnership between our two countries will be a mutually fruitful one.'

While in Brazil Mr. Shore had talks with Ministers and businessmen. He later went on to Venezuela.

BOTB News

Building costs in Europe

At the instigation of the National Consultative Council of Building and Civil Engineering Industries Working Group on Exports (a body sponsored by the Department of the Environment), a list of sources of information on building costs in Europe has been compiled by British Embassies in Europe and the Export Services Division of the British Overseas Trade Board.

In most cases the only sources of building cost information are governmental quasi-official and commercial statistics. Four countries, however, maintain or are instituting a building cost index comparable with that maintained in Britain by the Royal Institution of Chartered Surveyors. Elsewhere, information is less readily available.

One reason for differences in availability of information about building costs is that it is contrary to the interests of contracting companies to disclose such information, gathered at their own expense, to their competitors. In this context, the service provided by the quantity surveying profession in Britain has been exceptional.

The list is as follows:

SOME SOURCES OF INFORMATION ON BUILDING COSTS IN EUROPE

Austria

A source of information on building costs in Austria is:

Bundesinnung der Baugewerbe
Rotenturmstrasse 16-18
1010 Vienna
(Secretaries: Dr. Josef Fink
Frau Dipl. Ing. Dr. Blumauer)

The 'Bundesinnung der Baugewerbe' is the association of the building and construction trades and an official body. It compiles the building cost index which appears monthly in both the *Osterreichischen Bau Zeitung* and the *Monatsberichte* issued by the Osterreichischen Institut fur Wirtschaftsforschung. The latter publication contains a supplement entitled 'Statistische Ubersichten' in which the building costs index is to be found under the heading 'Prices and Wages'. The 'Bundesinnung der Gaugewerbe' also issues an annual handbook which contains building costs.

Detailed housing statistics are published annually by Osterreichisches Statisches Zentralamt: these also include building costs. The publication is entitled *Wohnbautatigkeit im* Jahre . . . .

Belgium

The principal source of information on building costs is the main contractors' confederation, namely:

Confederation Nationale de la Construction
Rue de l'Etuve 12
B-1000 Bruxelles

However, this body has no department centralising information. Each service section (materials, wages, etc.) is responsible for relevant statistics.

Cyprus

There is no institutional source of building cost information in Cyprus.

Information may be available by consulting quantity surveyors on a professional basis. The following British quantity surveyors are established in Cyprus:

Davson and Prichard (Cyprus)
Aspelia Court
Flat H1
PO Box 4039
Nicosia

MDA
28 Ion Street
PO Box 3566
Nicosia

Mr. R. S. Garrner
PO Box 3640
Nicosia

Denmark

The only regularly published information relating to building costs is in the form of an index published by Danmarks Statistik (Statistical Department) in its series 'Statistiske Efterretninger'. This index usually concentrates on the construction of dwellings but, from time to time, other activities such as road building are included. The address of the Statistical Department is:

Danmarks Statistik
Frederiksholms Kanal 27
DK – 1220 Copenhagen K

Information on actual building costs is not available in any great detail.

The Danish Contractors Association can, however, provide a limited amount of information although it might not have the relevant figures available at any one particular time because cost information is not collected on a regular basis. Inquiries to the association should be addressed:

Mr. Soren Bork
Entreprenorforeningen
Norre Voldgade 106
DK – 1358 Copenhagen K

A Danish cost consultancy firm is:

CBC Bygge Administration A/S
Kokkedal Industripark 29
DK – 2980 Kokkedal

Finland

The only body in Finland which publishes building costs statistics is the Central Statistical Office:

Tilastokeskus
Erottajankatu 10
00130 Helsinki 13

A very limited group of major building companies, the Board of Building, and the Helsinki City Authorities have an information exchange system which includes cost information but such information is accessible to members only. This is organised by a consultancy company, namely

Mec-Raster Oy
Satamakotu 4
00160 Helsinki 16

The Laboratory for Building Economics at the State Institute for Technical Research is proposing to build up an information system. Further information can be obtained from the laboratory at the following address:

Valtion teknillinen tatkimuskeskus
Rakennustalouden laboratorio
Otanieme
(Contact: Professor P. O. Jarle)

France

There is no service in France which is similar to the RICS cost index. The nearest equivalent is produced by a private firm:

Callon
2 rue Neuve
BP 70
17700 Surgeres
(Tel. (46) 07 02 77)

which publishes a monthly list of material costs (*Cours des Materiaux*) and a bi-monthly list of unit prices (*Bordereau General des Prix Unitaires du Batiment et des Travauz Publics*).

An additional source of information is:

Massia
2 rue de l'Echelle
75001 Paris

a publishing company which produces a quarterly list of prices (*Bordereau des Prix*), which serves for approximate estimates, and a *Serie des Prix* which is a huge volume of basic costs with a monthly index based on it. Le Serie de Prix, established by the Academy of Architecture is published by Massin Charles and Co., 2 rue de l'Echelle, Paris.

The above prices should be updated by scanning the '*Cours des Materiaux*' in the latest weekly issue of *Moniteur des Travaux Publics et du Batiment.*

Germany

Investigations into costs in the building trade are carried out by the Federal Statistical Office and the Land Authorities for Statistics. There is no central information service which calculates costs in the building trade and distributes the results to its members, although some building trade asssociations do undertake cost accounting for those of their members interested in such calculations.

The address of the Federal Statistical Office, from whom information can be obtained against a fee, is:

Statistisches Bundesamt
6200 Wiesbaden
G-Stresemann-Ring 11
(Telex: 4186511)

The Zentralverband des Deutschen Bangewerbes, 53 Bonn, Adenauerallee 93, publishes a yearbook containing extensive statistics, including wages and costs of building materials and of land as well as price trends. The yearbook is intended for members of the Association.

The monthly *Bundes Baublatt* contains statistical data 'Grundaten zur Wohnings und Bauwirtschaft'.

Greece

A source of information is:

The Technical Chamber of Greece
4 Karageori Servais Street
Athens

The Chamber represents Greek architects, civil engineers, etc.

Iceland

The Icelandic Statistical Bureau maintains a 'cost of building' index which is published four-monthly in the journal *Hagtidindi*.

Irish Republic

A building cost information service is operated by:

The Royal Institution of Chartered Surveyors
8 Merrion Square
Dublin 2
(Tel: Dublin 65500)
Administrator: Capt. W. J. Brewer)

Italy

Statistics on building costs are held by individual Chambers of Commerce. These include:

Camera di Commercio Industria e Agricoltura
Via Meravigli 9/11
20123 Milan

Camera di Commercio Industria e Agricoltura
Via de' Burro 147
00186 Rome

Camera di Commercio Industria e Agricoltura
Via E Amari 11
90139 Palermo

Luxembourg

A building cost index is maintained by:

Secotechnique Sarl
2 rue des Sapins
Senningerberg

Malta

There is no up-to-date index of building costs. There is a Building Costs Board which produced a booklet some years ago which contained a schedule of prices. This publication is, however, very out of date and is currently being reviewed by the Board. It is not known when this revision will be completed.

In the meantime, the best source of information would be a locally-established architect.

The Netherlands

An organisation holding information on building costs in the Netherlands is:

Bouw Centrum
Weena 700
Rotterdam
(Tel: 010 116181)

Bouw Centrum has access to resources of Govt. Depts. and trade associations in the construction industry.

Norway

There is no equivalent organisation in Norway to the Building Cost Information Service. The sort of information supplied by that body is not readily available from any one source, with the result that it would be necessary to contact several organisations in order to get an overall picture. For example, information on prices of building materials is issued regularly by a private company:

A/S Stormbull
Storgate 10A
Oslo 1

Information on materials and sources of supply in the building industry is available from:

Byggetjeneste
Haakon VII's gate 2
Oslo 1

General information on the construction industry in Norway may be obtained from the following organisations:

Byggefagradet
Kobenhavns gate 10
Oslo 5

Radgivende Ingeniorers Servicekontor
Wm Thranes gate 1
Oslo 1

Portugal

There is no equivalent in Portugal to the Building Cost Information Service. The only source of up-to-date information is the monthly bulletin of the National Institute of Statistics (INE).

A complementary source is the *Official Gazette* which publishes articles by the Ministry of Public Works, including price indices (Base 100: March 1968) for building costs (in relation to revisions of public works contract prices—Decree Law 47945 of 16 September 1967). This information is reprinted in *Boletim de Informacoes* which is a private publication.

These appear to exhaust sources available and are generally used by local contractors for their normal forecasts. For specific quotations, they rely on estimates from their own suppliers.

Spain

There is no organisation in Spain offering a similar service to that provided by the Building Cost Information Service. The following bodies do, however, provide information on certain aspects of construction costs:

Instituto Nacional de la Vivenda
Ministerio de la Vivenda
Plaza de San Juan de la Cruz s/n
Madrid
(who produce statistics on the cost of building)

Seopan
Avda del Generalisimo 79
Madrid
(this is a semi-official association of building and public works contractors which provides information on the cost of building labour and basic materials)

Instituto Eduardo Torroja de la Construccion y del Cemento
Avda Pio XII s/n
Madrid
(from time to time this organisation publishes information on the cost of building units (excavation work, foundations, etc.)).

There is also a magazine which contains every six months prices of building materials and the cost of building units (masonry, joinery, glass, paint, etc).

Construct
Ronda de General Mitre 107
Barcelona 6

Sweden

In Sweden, the body equating to the Building Cost Information Service of the Royal Institution of Chartered Surveyors is:

Institutet for Byggdokumentation
Halsingegatan 49
113 31 Stockholm
(Tel: 08/34 01 70)

Information and other assistance is given against service charges and subscription fees.

Switzerland

There are no statistics available on the Swiss construction industry on a country-wide basis but three cantons (Zurich, Berne and Lucerne) publish regularly index figures of building costs in their respective regions.

The figures published twice yearly (every 1 April and 1 October) by Statistisches Amt der Stadt Zurich are generally considered to be a good basis from which to calculate building costs. This organisation sells its semi-yearly publication, containing the latest building cost index, for S frs 3. The address is:

Statistisches Amt der Stadt Zurich
Napfgasse 6
8001 Zurich

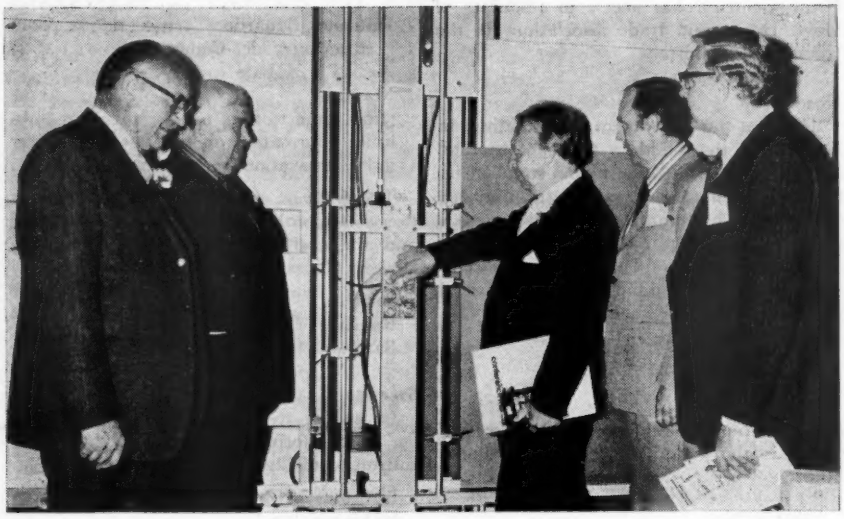
Yugoslavia

The Jugoslovenski gradjevinski centar (The Yugoslav Building Centre) in Belgrade publishes details of building material prices and labour costs. These publications are not quite equivalent of the RICS cost index but they are the only source of such information available in Yugoslavia. A suitable contact in the Building Centre would be:

Mrs. Ivanka Milanovic
Architect
Jugoslovenski gradjevinski centar
Bulevar revolucije 84
11000 Belgrade

Publications referred to above, when available, are usually accessible at the Statistics and Market Intelligence Library at Export House, 50 Ludgate Hill, London EC4M 7HV.

Exhibitions and Fairs



At last month's International South African Building Exhibition in Johannesburg, Mr. Justice Marais tests an item of British equipment watched by, to his right, the Mayor of Johannesburg and H. G. W. Bucknell of Multico Ltd. and, on his left, exhibition president H. Hallen and British Consul-General J. F. J. Jardine.

South African building show judged entirely constructive

From A. MacLeod, Vice-Consul (Commercial), British Consulate-General, Johannesburg: The International South African Building Exhibition was held at Milner Park, Johannesburg, 1-8 August. As was the case with the 1972 exhibition, it was organised by Specialised Exhibitions, part of the Hortors Group, and was opened by Mr. Justice Marais, Judge of the Supreme Court. A series of conferences (sponsored by the Building Industries Federation and the Institute of South African Architects, as well as other leading organisations in the industry) was held in conjunction with the exhibition.

Approximately 280 exhibitors took part. There were 25 British firms sponsored by the Building Materials Export Group under joint venture terms with the British Overseas Trade Board. The British stands were well placed and presentation was first class. Included in the British section was an inquiry and information stand manned jointly by the BMEG and the Building Exhibition Overseas Division.

On opening day of the exhibition, Mr. Justice Marais, accompanied by the Mayor of Johannesburg and J. F. J. Jardine, the British Consul-General and Director of Trade Promotion, visited the exhibition and made a tour of the British section, meeting all the exhibitors.

All but four of the British firms were already represented locally and the object of their participation was the further promotion of their products. Products featured on the British stands were: architectural ironmongery, hydraulic grabs, pre-stressing systems, surface treatment equipment, anchor bolts, timber preservative, bathroom fittings, woodworking machinery, diesel engines, oil fired boilers, mobile floodlighting units, aluminium shelving brackets, mobile hoists, power tools.

Inquiries and orders

Numerous trade inquiries of a high quality were received and firm orders booked by the British firms during the course of the exhibition exceeded £150,000. In addition, many follow-up orders are expected.

The consensus was that the exhibition was extremely successful and the British firms, without exception, considered that their participation had been extremely worthwhile. All but one are keen to exhibit again at a future similar event. The next International South African Building Exhibition is scheduled to take place in August 1976.

British food eats into world markets

The British Pavilion at the 2nd Tehran International Trade Fair, 17-29 September, will include a British Food Export Council Stand.

This will be a group stand, manned by BFEC, displaying products of a number of UK companies, including Quaker Oats, Chiltonian, Jacksons of Piccadilly, Ridgways, Ross Foods, Spillers and White Hudson. Information will also be available on a wide range of the processed foods Britain has to offer.

BFEC joins the great German 'Oktober Feste' celebrations in Munich with a National Stand at the 10th International Exhibition 'IKOFA' Munich, 19-25 September.

This exhibition, with an estimated attendance figure of 150,000, is an important event for food and drink exporters to Southern Germany. Fourteen British companies under the sponsorship of BFEC, will exhibit jams, preserves, biscuits, cakes, chocolates, confectionery, whisky, meat and meat products.

Northern Ireland will be represented on the British stand with exhibitors under the auspices of the Northern Ireland Agricultural Trust and the Livestock Marketing Commission for Northern Ireland.

International Food Fair, Copenhagen 4–9 March 1975: To date, 11 companies have signified their intention to participate in this event. There is plenty of space available for further exhibitors, states BFEC.

Food Exhibition, Dublin, 8–10 April 1975: Five companies have so far expressed interest in taking part in this event organised by the Confectionery, Biscuits and Allied Trades Importers Association. There is still time for further applications.

Salima – International Food Salon, Brno, Czechoslovakia, 21–28 February 1975: Eleven companies have expressed interest in exhibiting at this event; four with independent stand space on the joint venture area, and seven from a BFEC group stand.

The British Overseas Trade Board will give support to these events.

The Supermarket Institute Convention Exhibition, Dallas, 4–7 May 1975: This exhibition will again be held in the superbly appointed Convention Centre, Dallas, Texas, Following the success of the two earlier participations in 1973 and 1974, BFEC again intends to sponsor a joint venture stand at the exhibition in May 1975. The importance of this exhibition is now realised by British food and non-food manufacturers.

All who have aims of selling in, or servicing, the US mass market should be represented, states BFEC.

Aussie imports of our electrical goods increase

The British Electrical and Allied Manufacturers' Association is sponsoring on behalf of the United Kingdom Measurement, Control and Automation Conference and in co-operation with the British Overseas Trade Board a joint display of electrical and electronic equipment from seven United Kingdom manufacturers at the CETIA Exhibition, Melbourne, 7-11 October.

Australian imports of electrical goods from the United Kingdom increased from £39 million sterling in 1972 to £46 million sterling in 1973, states BEAMA.

At a seminar associated with the exhibition, papers are being presented by five United Kingdom companies: Digico Ltd., Application of mini-computers, by K. G. Trickett; Klippon Electricals Ltd., Developments in terminations, by J. H. Tyler; Marconi Instruments Ltd., Frequency domain analysis, by R. S. Titchmarsh; Brentford Electric Ltd., A standard thyristor firing system for UK 'Modular' range of telephone exchange power supply types 126 and 127, by M. G. J. Fry; GEC Industrial Controls Ltd., Static power conversion equipment, by K. W. J. Bishop.

The seven firms in the joint display are: Critchley Brothers Ltd., Brimscombe, Stroud, Glos.; Crompton Parkinson Ltd., Witham, Essex; Digico Ltd., Stevenage; Environmental Equipments Ltd., Wokingham; Klippon Electricals Ltd., Sheerness; Marconi Instruments Ltd., St. Albans; Vero Electronics Ltd., Eastleigh, Hants.

Joint venture at nuclear research display

The British Overseas Trade Board and the Measurement, Control and Automation Conference are sponsoring a joint venture of 14 British manufacturers of electronic and associated equipment at the European Organisation for Nuclear Research (CERN), Geneva, 21-25 October, The joint venture is organised and presented by the British Electrical and Allied Manufacturers Association.

CERN, the largest single purchaser of electronic equipment in Europe, is engaged in fundamental research principally in subnuclear physics for which 12 European countries, including Britain, provide financial support.

British exhibitors at CERN are: AEI Semiconductors Ltd., Lincoln; Beckman Instruments Ltd., Glenrothes; British Insulated Callender's Cables Ltd., Prescot; EMI Electronics Ltd., Hayes, Middlesex; English Electric Valve Co. Ltd., Chelmsford; GEC Computers Ltd., Borehamwood; Grenson Electronics Ltd., Daventry; Isopad Ltd., Borehamwood; Nuclear Enterprises Ltd., Beenham, Reading; D. A. Pitman Ltd., Weybridge; Solartron Electronic Group Ltd., Farnborough, Hampshire; 20th Century Electronics Ltd., New Addington, Croydon; Westinghouse Brake and Signal Co. Ltd., Chippenham; Willsher and Quick Ltd., Highbridge, Somerset.

Melbourne teach-in for summer of '75

The Industrial Council for Educational and Training Technology and the British Overseas Trade Board are preparing a joint venture to the Third Education Exhibition and Conference to be held in the Exhibition Building, Melbourne, 17-21 June next year. At a recent meeting held to discuss the educational market in Australia, over 50 firms from the UK indicated their interest in participating in the exhibition.

The exhibition and conference attracts the largest audience of educators, teachers and educational administrators of any event in the Southern Hemisphere and will be particularly important in 1975 in view of the recently accepted Karmel Report which indicates an enormous increase in the Australian educational budget for the procurement of equipment at all levels, states ICETT.

Further details are available from: Miss S. Down, ICETT Ltd., Leicester House, 8 Leicester Street, London WC2; tel. 01-437 0678.

Shoe show shelved by present problems

Despite a favourable response received from a number of individual and specialised sectors within the industry, including over 100 intending participants from Britain, West Germany, Italy, France, Switzerland, Belgium, the Netherlands, Spain, Czechoslovakia, the USA and Malaysia, the 1975 International Shoe Materials and Machinery Exhibition has been postponed.

Mack-Brooks Exhibitions Ltd., the organiser, states that response to the initial anouncement regarding the event also showed that promotional plans of many potential exhibitors were adversely affected by current economic difficulties. This factor, coupled with companies' existing commitments, prevented next year's launching of an international exhibition which would be genuinely representative of the industry as a whole.

The revised dates are provisionally planned for mid-1977, though this will be confirmed only after further consultation with individual companies, trade associations and other organisations both in the UK and overseas. The venue remains as previously announced – the Halls of the Swiss Industries Fair in Basle, Switzerland.

Pictured at the opening of the British Industrial Exhibition in Sao Paulo, the biggest ever single trade promotion abroad staged by the British Overseas Trade Board, is Princess Alexandra who declared the event open. On the Princess's left is the Hon. David Montgomery, president of the exhibition, and, on her right, is the Governor of the State of Sao Paulo. At this event, over 340 British firms were represented, featuring a wide range of industrial products, processes and equipment on a 20,000 sq. m. site at Anhembi Park, Sao Paulo.

Export Business

A British hydraulic excavator (*above*) is on its way to New Zealand to work on a 245-mile pipeline. The 32-ton Hy-mac 1290, largest of a range of earthmoving equipment made by a member company of the Powell Duffryn Group, is scheduled to arrive in New Zealand at the end of this month, following its departure from Liverpool Dock. The Hy-mac will be used for digging trenches for the on-shore pipeline from the Maui Gas Field, located south-west of New Plymouth in the North Island. The excavator, built at Hy-mac's Rhymney factory in South Wales, was bought by New Zealand's Ministry of Works which is constructing the pipeline.

Second sugar scoop seals sweet success

Fletcher and Stewart of Derby, the sugar machinery manufacturing subsidiary of Booker McConnell, has announced that it has been awarded its second contract within a year for the supply and construction of a complete sugar factory in the Sudan.

This second factory will be built at Hagar El Asalaya in the White Nile Province, about 60 miles from the site of the Sennar sugar factory for which Fletcher and Stewart secured its first major contract in the Sudan in January.

Although the two factories differ in certain respects, each will be capable of processing 6,500 tons of sugar cane a day and they will between them have the capacity to produce 250,000 tons of refined sugar annually.

While arrangements for the financing of the Asalaya project – which is worth approximately £20 million – have not yet been finalised, Fletcher and Stewart hopes that the contract will become fully effective by the end of November.

The new factory is scheduled for completion in March 1977.

UK medical specialist injects equipment into Colombia system

A successful breakthrough into the potentially large market for medical equipment in South America has been made by Kent Cambridge Medical Ltd. This medical instrumentation specialist company in the George Kent Group has won initial orders for its advanced patient monitoring systems totalling around £150,000 from the Ministry of Health in Colombia which is expanding its national health service in a multi-million pound development programme.

The order includes the company's very latest medical equipment, some of which has only recently found its way into British hospitals. A number of versions of the Cambridge Care Unit (CCU) are being supplied to Colombia. The CCU, a modular system designed for coronary and intensive care, provides simple-to-operate bedside monitoring of the basic indicators of a patient's medical condition – ECG, heart rate and blood pressure. Up to six patients can be simultaneously monitored by nursing staff at a central console, a feature of the CCU.

Three six-bed and four four-bed CCU intensive care units are being supplied and will provide ECG and blood pressure monitoring at the bedside.

These CCUs are similar to those supplied to hospitals and clinics in many parts of the world by Kent Cambridge Medical. Units for up to six patients are now in use in the UK, the Philippines, Malaysia, Portugal, Spain.

Also covered by the order are three multi-channel fibre optic medical recorders – one 12-channel and two six-channel units. These recorders are multi-purpose monitoring and recording systems for use in diagnosis, catheter rooms, operating theatres and research laboratories. Based on modular design principles, they monitor and record such parameters as ECG, phonocardiogram, blood pressure, pulse, and respiration.

They are in use in hospitals and research establishments throughout the world – in Australia, South America, Africa, the Indian sub-continent, the Far East and Europe, as well as in the Soviet Union and the USA.

A considerable quantity of other instrumentation is also being supplied by the Cambridge company including 36 trolley-mounted VS4 electro-cardiographs, among the most advanced of their kind, and seven complete Cambridge resuscitation trolleys. The latter incorporate ECG and heart rate displays, ECG print-out facilities, a defibrillator and heart pacemakers. Other equipment consists of 12 synchronised defibrillators together with ventilators for intensive care, and neo-natal, paediatric and therapeutic respiratory appliances.

Budapest and London do light fantastic

Alfred Bader Ltd., South London lamp-making machine specialist, has received an order from the Hungarian state manufacturing company, Tungsram, for the design of an entirely novel group of machines to make miniature lamps at a rate of 4,000 per hour. Conventional machines produce 1,200 to 2,000 lamps an hour, states Bader.

Of interest is the co-operative nature of the project. In the first instance Alfred Bader will carry out the R & D and produce the drawings. Tungsram will build the first group of machines. Afterwards Alfred Bader will be free to manufacture these machines in Britain and market them world wide.

Official Receivers' offices

Official Receivers are responsible for the administration of cases in bankruptcy and compulsory liquidation. Inquiries should be addressed to the nearest Official Receiver

High Court of Justice
Senior Official Receiver: A. T. Cheek

Bankruptcy
Thomas More Building, Royal Courts of Justice, Strand, London WC2A 2JY (Tel: 01-405 7641)
Official Receivers: R. B. Howard; J. Tye

Companies Winding-up
Inveresk House, 346 Strand, London WC2R 0HJ (Tel: 01-836 7733)
Official Receivers: L. R. Bates; N. Saddler; D. A. Williams

Birmingham
Commercial Union House, Martineau Square, Birmingham B2 4UP
(Tel: 021-236 8831/7)
A. D. Gwyther; J. F. Hirst

Bournemouth
Burlington Arcade, Bournemouth BH1 2JS
(Tel: 0202-28208/9)
A. H. Horler

Bradford
West Riding House, Cheapside, Bradford BD1 4LJ
(Tel: 0274-33651/2)
V. Duffy

Brighton
Windsor House (East Entrance), 30-35 Edward Street, Brighton BN2 2JZ
(Tel: 0273-64301/2)
J. F. O'Reilly

Bristol
Sun Alliance House, 4 Colston Avenue, Bristol BS1 4BN
(Tel: 0272-290268)
D. S. Clackett

Cambridge
49 Bateman Street, Cambridge CB2 1LT
(Tel: 0223-53930 and 59646)
R. F. Savage

Canterbury
Lombard House, 12-17 Upper Bridge Street, Canterbury
(Tel: 0227-62070 and 65037)
A. R. Haigh

Cardiff
3rd Floor, Hayes House, The Hayes, Cardiff CF1 2UG
(Tel: 0222-30575)
B. J. Longley

Chester
Dee Hills Park, Chester CH3 5AR
(Tel: 0244-21471/2)
K. Matthewson

Croydon
Park House, 22 Park Street, Croydon CR9 1TX
(Tel: 01-681 2633)
R. A. D. Copper

Exeter
Eastgate House, High Street, Exeter EX4 3JU
(Tel: 0392-55445)
A. J. Seldon

Gloucester
Grosvenor House, Station Road, Gloucester GL1 1ST
(Tel: 0452-21658/9)
H. W. Kirkwood

Hull
Beverley House, St. Stephen's Square, Hull HU1 3XF
(Tel: 0482-23720 and 23729)
J. E. Friend

Ipswich
St. Clare House, Greyfriars, Ipswich IP1 1LX
(Tel: 0473-56731)
T. A. Tuck

Leeds
Pearl Chambers, East Parade, Leeds LS1 5BX
(Tel: 0532-28011/2)
W. A. Bishop

Leicester
Prospect House, 94 Regent Road, Leicester LE1 7DE
(Tel: 0533-22251/3)
H. Roach

Liverpool
West Africa House, 25 Water Street, Liverpool L2 0RQ
(Tel: 051-236 8397/8)
R. W. F. Pagan

Manchester
Townbury House, 11 Blackfriars Street, Salford M3 5AB
(Tel: 061-832 2471)
K. A. Miller; A. N. Percy

Newcastle upon Tyne
3rd Floor, 4 St. Nicholas Buildings, St. Nicholas Street, Newcastle upon Tyne NE1 1RF (Tel: 0632-21104/5)
F. Durkin

Northampton
6 Cheyne Walk, Northampton NN1 5QA
(Tel: 0604-37288/9)
R. F. Savage

Norwich
Davey House, Castle Meadow, Norwich NOR O2D
(Tel: 0603-28983/4)
T. A. Tuck

Nottingham
1 Collin Street, Nottingham NG1 7EP
(Tel: 0602-51596/8)
W. W. Jordan

Plymouth
63 New George Street, Plymouth PL1 1RD
(Tel: 0752-68554)
A. J. Seldon

Reading
PO Box No. 40, Somerset House, 3 Blagrave Street, Reading RG1 1QE
(Tel: 0734-581931/5)
R. G. Goddard

Rochester
Gordon House, Star Hill, Rochester
(Tel: 0634-42603 and 46906)
A. R. Haigh

St. Annes
Petros House, St. Andrews Road North, Lytham St. Annes FY8 2JD
(Tel: 039-15-21271)
M. Clark

Sheffield
8/12 Furnival Gate, The Moor, Sheffield S1 4QN
(Tel: 0742-26691/3)
T. Wilks

Southampton
21 London Road, Southampton SO9 1NQ
(Tel: 0703-23348/9 and 23340)
A. H. Horler

Southend
2nd Floor, Colman House, Victoria Avenue, Southend-on-Sea SS2 6EF (Tel: 0702-41316/7)
F. L. Sage

Stockton
4 Bridge Road, Stockton-on-Tees, Teesside TS18 3BP
(Tel: 0642-65598/9)
F. Durkin

Stoke
London House, Hide Street, Stoke-on-Trent ST4 1QN
(Tel: 0782-45256/8)
A. K. Sales

Swansea
5th Floor, Sun Alliance Building, 166/167 Helens Road, Swansea SA1 5DL
(Tel: 0792-42861)
P. W. Nunn

Watford
40 Clarendon Road, Watford WD1 1HJ
(Tel: 0923-44288)
F. L. Sage

Trade Information

Britain's largest single contract in East Europe: £150m project for Polish tractor and diesel engine industries

Peter Shore, Secretary of State for Trade, with Albert Thornbrough, president of Massey-Ferguson Ltd., and (right) Tadeusz Wrzaszczyk, Polish Minister of the Machine Industry, after the announcement of Massey-Ferguson-Perkins' success in obtaining the contract for the expansion of the Polish Ursus tractor plant.

The £150 million contract won by Massey-Ferguson-Perkins for the expansion of the Polish tractor and diesel engine industries is the largest single contract won so far by British industry in East Europe.

It is also believed to be the largest contract ever placed by a Polish enterprise with a firm in the West and can be regarded as the first major success under the 1973 Long Term Economic, Industrial, Scientific and Technical Co-operation Agreement between the two countries.

The contract, announced in London on 23 August, is between Massey-Ferguson-Perkins and the Polish enterprise Agromet Motoimport, and provides for a long-term partnership between the British and Polish tractor industries.

The project is to be financed with the help of a loan to be extended by a syndicate of British banks headed by Barclays Bank, with the guarantee of the Export Credits Guarantee Department. British companies within the Massey-Ferguson group will be responsible for the administration of the contract, and the lion's share (approximately 70 per cent) is likely to come to British suppliers of plant and services.

Peter Shore, Secretary of State for Trade, commenting on the decision to award the contract to Massey-Ferguson-Perkins, said: 'This is a magnificant achievement which reflects the greatest credit to all those concerned with these long and tough negotiations. It is the largest single contract won so far by British industry in Eastern Europe. It provides for extensive co-operation between the two partners in the production and marketing of tractors.

'Thus it not only gives practical expression to the Long Term Co-operation Agreement concluded with Poland last year, but also it will make a significant impact on future trade and economic relations between the United Kingdom and Poland – a market which is already the largest market in Eastern Europe for British goods.

'Her Majesty's Government has given the United Kingdom companies involved its full support during the two years of negotiations.'

The Polish Minister of the Machine Industry, Tadeusz Wrzaszczyk, made a short visit to London in order to take charge of the final round of the negotiations with the Massey-Ferguson team, which was led by Albert Thornbrough, president of Massey-Ferguson Ltd., Toronto. Following the successful conclusion to the negotiations Mr. Wrzaszczyk made a call on Mr. Shore at the Department of Trade.

Trade with Poland continues to expand: in 1973 two-way trade reached a record level of £260 million, and it seems likely that there will be a further improvement this year. In the first seven months of 1974, United Kingdom exports to Poland amounted to £80.9 million, while United Kingdom imports totalled £68.4 million, representing a 22 per cent increase in two-way trade over 1973.

ANGLO-POLISH TRADE

Value £ million

	1969	1970	1971	1972	1973	1973 Jan./July	1974 Jan./July	% increase 1973 over 1972
UK exports (including re-exports) fob	55.0	59.7	64.3	75.4	111.2	68.4	80.9	48%
UK imports cif	57.0	63.0	59.9	70.7	95.1	54.1	68.4	34%
	−2.0	−3.3	+4.4	+4.7	+16.1	+14.3	+12.5	Two-way trade 41%

+ = balance for UK. − = balance for Poland

Applications for temporary exemption from import duty

The Department of Trade is considering applications for the temporary exemption from import duty of the materials listed below on the grounds that these materials are not made in this country or the Commonwealth or the supply available from these sources is not substantial having regard to the existing United Kingdom demand.

Representations are invited from manufacturers in this country or agents of Commonwealth manufacturers who consider they are, or will be within a reasonable period, in a position to supply a substantial proportion of the United Kingdom demand for these materials, or who are interested in their future production.

Temporary exemptions come into effect on the operative date of the Treasury Order in which the materials are specified and normally continue until the end of the current calendar year, when they are reviewed.

Interested parties who wish to make representations should address them to Tariff Division, Department of Trade, Kingsgate House, 66-74 Victoria Street, London SW1E 6SJ, preferably through a Trade Association, giving the respective reference shown below and stating whether their names may be passed to the applicants for temporary exemption. Representations should be received by 19 September 1974.

Tariff heading	Proposed definition for tariff purposes	Applied for as	Exemption required until	Reference
29.34	Nickel (II) di(ethyl-3, 5-di*tert*butyl-4-hydroxybenzyl-phosphonate	Nickel-3,5-di-*t*-butyl-4-hydroxybenzyl phosphonic acid mono-ethylate	31 December 1974	15133
35.04	Soya protein isolate having an isoelectric point of 4.8 plus or minus 0.4 and which contains not less than 94% by weight of protein (Nx 6.25) on a dry basis	Soya Protein isolate	31 December 1974	15175
39.02	Poly(vinyl chloride), in powder form and of natural colour, unplasticised but containing not less than 1% by weight and not more than 2.5% by weight of poly(butyl acrylate) when determined by infra-red absorption at a wavelength of 5.81 micrometres	Polyvinyl chloride resin – modified suspension type homopolymer	31 December 1974	14813
48.05	Tissue paper, creped, white, wood-free, two ply, weighing not less than 16 g. per sq. m. per ply and not more than 19 g. per sq. m. per ply, in reels not less than 18 centimetres in width	2-ply facial tissue	31 December 1974	15173

REVISED DEFINITION

Interested parties will wish to know that the definition for steel wire (73.14 and 73.15) advertised in *Trade and Industry* on 8 August 1974 has been revised as follows:

73.15 Wire, of alloy steel, of circular cross-section, in coils and having a diameter of not less than 0.6 mm. and not more than 5.0 mm.; containing not more than 0.25% by weight of carbon, not less than 1.3% and not more than 1.70% by weight of manganese and not more than 1.5% by weight of silicon as the major alloying elements.

Notice to importers: imports of bananas from the dollar area

A Notice to Importers published in the 22 August edition of *Trade and Industry* (page 387) gave details of the latest supplementary quota which has been established for imports of bananas from the Dollar Area.

Eric Deakins, Parliamentary Under-Secretary of State for Trade, visiting the pavilion of the People's Republic of China at the International Handicrafts and Do-It-Yourself Exhibition at Olympia. The pavilion housed the first official exhibition of arts and crafts from the People's Republic of China to be held in the UK for 18 years. It was sponsored by the China Council for the Promotion of International Trade at the invitation of the exhibition organisers and the Sino-British Trade Council.

Will importers please note that the amount quoted, (5,000 tons) was incorrect. The figure should read 8,000 tons.

All the other conditions of the Notice remain unchanged.

Hints to business men booklets

Revised editions of the booklets on Finland, the USSR, and South Korea have been published in the 'Hints to business men' series. British business men who intend visiting these countries on export business can obtain copies of the booklets on application to Export Services and Promotions Division, Department of Trade, Room D05, Export House, 50 Ludgate Hill, London EC4M 7HU (tel. 01-248 5757 ext. 7146) or to any Regional Office of the Department of Industry.

British boats in Cyprus

The harbour master at Kyrenia would like British owners of boats lying in the harbour to notify him, giving their name and address and particulars of the boat.

Notification should be addressed to Mr. Hamit Shemi, Customs Director, Girne (Kyrenia, Cyprus) Mersin 10, Turkey.

Write or phone the Specialists:

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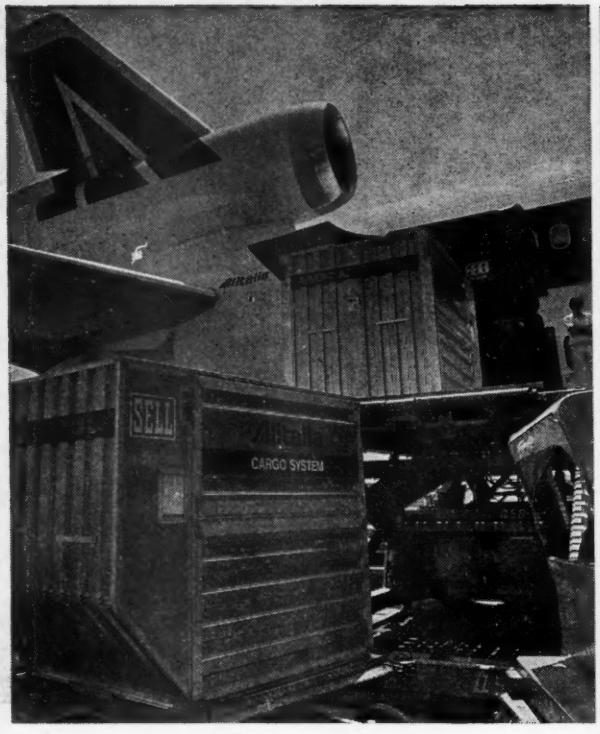

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Glasgow (041) 221 5314 Manchester (061) 489 3207
Dublin 77 51 71

Alitalia
CARGO SYSTEM

Tariff and Trade Notices

Spain

Textile fabrics and raw materials: import duty suspensions and reductions

The Spanish *State Gazette*, 5 August 1974 announced import duty suspensions or reductions valid from 10 July to 9 October 1974 on certain textile fabrics, and raw materials for their manufacture, classified under the following tariff headings:

SUSPENSIONS

50.02	53.01.D	53.03.A.2.b	53.05.A.1
53.01.A.1	53.02.A.2	53.03.A.3.a	53.05.A.2
53.01.A.2	53.03.A.1.a	53.03.A.3.b	53.05.B.1
53.01.B	53.03.A.1.b	53.03.B	53.05.B.2
53.01.C	53.03.A.2.a	53.04	

REDUCTIONS and rate of duty now applicable:

	Per cent		Per cent
50.04.A.1	7	53.11.A.3	10
50.04.A.2	7	53.11.B.1	12
50.04.B.	9	53.11.B.2	11
50.05.A.1.a	7	53.11.B.3	10
50.05.A.1.b	8	53.12.A	9
50.05.A.2	9	53.12.B	9
50.05.B	9	53.13	9
50.06.B	8	56.01.A.1	7
50.07	11	56.01.A.2	7
50.08.A	7	56.01.A.3	7
50.08.B	9	56.01.A.4	7
50.09.A	17	56.01.B.1	7
50.09.B	17	56.01.B.2.a.1	8 with a specific minimum of 4 pesetas/kg. net
50.09.C	17		
50.10.A	7		
50.10.B	9		
50.10.C	12	56.01.B.2.a.2	10 with a specific minimum of 4 pesetas/kg. net
51.01.A.1.a	7		
51.01.A.1.b	7		
51.01.A.2.a	7		
51.01.A.2.b	7	56.01.B.2.b	8
51.01.A.3.a	7	56.01.B.2.c	7
51.01.A.3.b.	7	56.01.B.2.d	7
51.01.A.4.a.	7	56.02.A.1	6
51.01.A.4.b	7	56.02.A.2	6
51.01.B.1.a.1	7	56.02.A.3	6
51.01.B.1.a.2	7	56.02.A.4	6
51.01.B.1.b.1	7	56.02.B.1.a	6
51.01.B.1.b.2	7	56.02.B.1.b	6
51.01.B.2.a	7	56.02.B.2	6
51.01.B.2.b	7	56.02.B.3	6
51.01.B.3.a	7	56.02.B.4	6
51.01.B.3.b	7	56.03.A	7 with a specific minimum of 12 pesetas/kg.
51.01.B.4.a	7		
51.01.B.4.b	7		
51.02.A.1	8		
51.02.A.2	8	56.03.B.1.	7 with a specific minimum of 3.60 pesetas/kg.
51.02.A.3	8		
51.02.A.4	8		
51.02.B.1.a	7		
51.02.B.1.b	7	56.03.B.2	7 with a specific minimum of 6.50 pesetas/kg.
51.02.B.2	7		
51.02.B.3	8		
51.02.B.4	8		
51.03.A	10	56.04.A.1	6
51.03.B	10	56.04.A.2	6
51.03.C	10	56.04.A.3	6
51.04.A.1	15	56.04.A.4	6
51.04.A.2	15	56.04.B.1	6
51.04.A.3	15	56.04.B.2.a.1	6
51.04.B.1	13	56.04.B.2.a.2	6
51.04.B.2	13	56.04.B.2.b	6
51.04.B.3	15	56.04.B.2.c	6
51.04.C.1	13	56.04.B.2.d	6
51.04.C.2	14	56.05.A.1	10
51.04.C.3	16	56.05.A.2	10
53.06.A.1	5	56.05.A.3	10
53.06.A.2	6	56.05.A.4	10
53.06.B	6	56.05.B.1	10
53.07.A.1	5	56.05.B.2.a.1	7
53.07.A.2	6	56.05.B.2.a.2	9
53.07.B	6	56.05.B.2.b	7
53.08.A.1	5	56.05.B.2.c	10
53.08.A.2	5	56.05.B.2.d	10
53.08.B.1	5	56.06.A	10
53.08.B.2	5	56.06.B.1.a	10
53.08.C	5	56.06.B.1.b	10
53.09.A	5	56.06.B.2	11
53.09.B	5	56.07.A	15
53.10	7	56.07.B.1.a	15
53.11.A.1	10	56.07.B.1.b	17
53.11.A.2	10	56.07.B.1.c	17

Further information

In many cases further information on the notices published on these pages is available to British exporters from the Department of Trade. The main branches concerned are: Commercial Relations and Exports (CRE) Divisions, 1 Victoria Street, London SW1H 0ET (tel: 01-222 7877); and Export Data Branch (EDB), Export House, 50 Ludgate Hill, London EC4M 7HU (tel: 01-248 5757). In each case, the relevant information source is indicated at the end of the notice by its initials (CRE or EDB) and the appropriate telephone extension number. In the Tariff and Trade Notices section countries are grouped by continents as far as possible; they are listed alphabetically on the contents page.

	Per cent		Per cent
56.07.B.2	19	60.03.A.1	19
58.01.A	23	60.03.A.3	18
58.01.B	18	60.03.B.1	19
58.02.A.1	30	60.03.B.3	18
58.02.A.2	26	60.03.B.4	20
58.02.A.3	30	60.03.C.2	19
58.02.B	23	60.04.A	20
58.04.A	19	60.04.B	17
58.04.B	19	60.04.D.1	17
58.04.C	21	60.04.D.2	18
58.04.D	20	60.05.A	22
58.05.A	20	60.05.B	17
58.05.B.1	21	60.05.D.1	18
58.05.B.2	21	60.05.D.2	18
58.05.C	20	60.06.A.2	16
58.05.E	21	60.06.B.2	16
58.06	26	61.01.B	22
58.07.A.2	19	61.01.C	23
58.07.B.2	19	61.01.D	22
58.07.C.2	19	61.02.B	22
58.07.D.2	18	61.02.C	23
58.08.A	23	61.02.D	22
58.08.B	23	61.03.B	26
58.09.A	23	61.03.C	23
58.09.B	23	61.03.D	24
58.09.C	23	61.04.B	22
58.09.D.1	20	61.04.C	23
58.09.D.2	20	61.04.D	22
58.10.A	20	51.05.A	24
58.10.B	20	61.07.A	23
59.02.B	21	61.07.B	20
59.03.A	25	61.08	19
59.07	25	61.09	26
59.08	25	61.10.B	23
59.09	26	61.10.C	23
60.01.A	17	61.10.D	24
60.01.B	16	61.11.B	19
60.01.D.1	17	61.02.B	21
60.01.D.2	18	62.05.B.2	21
60.02	20		

EDB ext. 462/471/472/473

Import duty suspensions extended

Notice was given in *Trade and Industry*, 11 July 1974, of the suspension of import duty until 21 August on paper-making materials, paper and paperboard under tariff headings in chapter 47 and 48 of the Spanish customs tariff. The Spanish *State Gazette*, 23 August 1974, announced the extension of the period of validity until 21 October 1974.

Notice was given in *Trade and Industry*, 20 June 1974, of the suspension of import duty until 21 August on tariff headings 28.16.A, liquefied ammonia, 28.42.C, carbonate: neutral, of sodium; and 29.04.A.1, methyl alcohol. The Spanish *State Gazette*, 23 August 1974 announced the extension of the period of validity until 22 November 1974.

EDB ext. 462/471/472/473

Import duty: temporary suspensions

In *Trade and Industry*, 22 August 1974, page 388, tariff heading 17.07.A.2.b.7, should have read 15.07.A.2.b.7.

EDB ext. 462/471/472/473

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Telephone: 051-236 9354. Telex: 62190
Telegrams: UKWAL LIVERPOOL

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Greece

Import regulations

The attention of UK exporters in drawn to obligatory procedures for importing into Greece. The import procedure itself is relatively simple. However, for price control purposes local Chambers of Commerce are required to validate pro-forma invoices, on behalf of the Central Price Committee.

In general, price control is based upon world prices at any given time, plus or minus 5 per cent (a greater tolerance may be allowed on luxury goods).

Pro-forma invoices must be submitted for validation by the importer/agent as soon as a contract is concluded. To avoid difficulty at the time of importation, exporters should despatch pro-forma invoices speedily to Greece and ensure that the procedure is carried out promptly at the other end, particularly where commodities susceptible to wide price fluctuations are concerned. **EDB ext. 439**

Lebanon

Greenhouse equipment: exemption from import duty

The Lebanese authorities have issued Decree 8152 which exempts from import duty almost all kinds of product used in the manufacture and/or equipment of greenhouses. The item numbers under which these exemptions fall are: 39.01, 39.02, 39.03, 39.04, 39.05, 39.06, 39.07, 73.21, 73.36, 73.37, 76.08, 84.15 and 90.28. Full details of the products and equipment concerned are available.

EDB ext. 420/475

Jordan

Commercial Agencies and Intermediaries Law

The Jordanian authorities issued a regulation on 1 August 1974 concerning Commercial Agencies and Intermediaries Law No. 20 (see *Trade and Industry*, 20 June 1974, page 600). The regulation reads as follows:

> The Ministry of National Economy has the right to open registers and issue the necessary forms for the implementation of this regulation.
>
> Before issuing registration certificates and documents related to commission agents and intermediaries the Ministry shall charge the following fees:
>
> a Registration of commercial agents — JD 25
> b Registration of each commercial agency — JD 10
> c Registration of commercial intermediary — JD 15
> d Registration of changes in agency or intermediary agreements — JD 4
> e Issue of certified copies of information contained in the register – each copy – — JD 2
> f Inspection of registers — JD 1

This is the full information on the regulation. **CRE ext. 3454**

Senegal

Import regulations

According to a recently published decree (No. 74/446), importation of all goods under tariff heading 48.18 (registers, exercise books, note books, memorandum blocks, order books, receipt books, diaries, blotting pads, binders (loose-leaf and other), file covers and other stationery of paper or paperboard, sample and other albums and book covers, of paper or paperboard) is now subject to prior authorisation from the Minister of Commerce. **EDB ext. 472/462/471/473**

Zaire

Circular 139: provisions modified

Circular 139, issued in January 1972, laid down that prices of imports into Zaire must be 3 per cent less than those current in 1971. In a letter dated 8 August 1974 to the President of the Zairian Association of Banks, the Bank of Zaire has stated that henceforth the Office Zairois du Controle (OZAC) is authorised to issue attestations of verifications for all imports regarding which foreign suppliers have given to the Zairian importers a discount of 3 per cent on current prices or an interest free credit of at least 90 days from the date of shipment. Attestations will be issued bearing details of the agreed conditions of payment and Zairian banks must respect these conditions in the negotiation of documentary credits.

It follows from the Bank of Zaire's statement that the provisions of Circular 139 are much modified and that it will no longer be necessary for the importer, or the exporter, to make applications for derogations, which include detailed justifications for price increases.

CRE ext. 5334/3338

South Africa

Reductions in sales duties

The following amendments were published in the South African *Government Gazette* of 15 August:

BN tariff heading	Description	Rate of sales duty
39.00	1 Drinking-straws of artificial resins or plastic materials	5%
39.07	1 Table and kitchen utensils (excluding disposable cups and similar containers for vending food or beverages); household, sanitary and toilet articles (excluding building fixtures or fittings); insulated containers for food or beverages; ash-trays; plugs for baths, sinks, washbasins and the like; coat hangers; household refuse bins	5%
	8 Pneumatic mattresses, pillows, cushions and the like; table cloths, tray cloths, doilies and similar household articles (excluding floor coverings); bags of sheet or film (excluding those for commercial or industrial packaging and medical equipment)	5%
40.14	Articles of unhardened vulcanised rubber, the following:	
	1 Plugs for baths, sinks, washbasins and the like; pneumatic mattresses, pillows, cushions and the like; inner tube repair patches	5%
	2 Stationery and other articles suitable for office use; tobacco pouches	15%
40.16	Articles of hardened rubber (ebonite and vulcanite), the following:	
	1 Articles suitable for domestic use (excluding building fixtures and floor coverings)	5%
	2 Articles suitable for personal or office use; fancy goods, statuettes and articles for interior decoration	15%
44.24	Household utensils of wood	5%
44.27	1 Bathroom wall cabinets and other articles of furniture, of wood, not falling within item 150.00; trays and fruit bowls	5%
	2 Caskets, cigarette boxes, ornaments and other fancy articles, of wood; cases for cutlery, for drawing instruments or for violins, and similar receptacles, of wood; articles of wood for personal use or adornment, of a kind normally carried in the pocket, in the handbag or on the person	15%
48.21	2 Paper lace, shelf-edging, table cloths, table mats, doilies, serviettes, handkerchiefs, hand towels and the like	5%
	3 Trays, dishes, plates, cups (excluding cups and similar containers for vending food or beverages), dripmats, cake shapes, pie-dishes, collars, cake mounts and dummies; drinking-straws	5%
69.11 and 69.12	Tableware and other articles of a kind commonly used for domestic purposes or toilet purposes (excluding building fixtures), of porcelain or china or of other kinds of glazed pottery	5%
70.13	Glassware not elsewhere specified or included in this item:	
	1 Glassware of a kind commonly used for table, kitchen or toilet purposes	5%
	2 Glassware of a kind commonly used for office purposes, for indoor decoration or for similar uses	10%
73.34	Pins (excluding hatpins and other ornamental pins and drawing pins), hair pins and curling grips, or iron or steel	5%
73.36	Grates, fires and other space heaters, plate warmers with burners, wash boilers with grates or other heating elements, and similar equipment	5%

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BN tariff heading	Description	Rate of sales duty
73.38, 74.18, 75.06, 76.15 and 80.06	Articles of a kind commonly used for domestic purposes and sanitary ware for indoor use, or iron or steel, copper, nickel, aluminium or tin (excluding parts thereof, building fixtures, communion set pieces, fonts and other like articles identifiable for use by religious bodies at public worship)	5%
74.17	2 Grates, fires and other space heaters, plate warmers with burners, wash boilers with grates or other heating elements, and similar equipment	5%
82.04	Kitchen hand tools	5%
82.08	Coffee-mills, mincers, juice-extractors and other mechanical appliances, of a mass not exceeding 10 kg. and of a kind used for domestic purposes in the preparation, serving or conditioning of food or drink	5%
82.11	Razors and razor blades (excluding parts of razors and razor blade blanks)	5%
82.12	Scissors, including tailors' shears (excluding blades therefor)	5%
82.13	1 Paper knives, manicure and chiropody sets and appliances (including nail files)	10%
	2 Other articles of cutlery (for example, secateurs, hair clippers, butchers' cleavers) (excluding pruning, gardening and other secateurs, identifiable for use solely or principally for agricultural purposes)	5%
84.17	1 Instantaneous or storage water heaters, non-electrical (excluding solar heaters and heaters of a kind designed for industrial use)	5%
84.18	Laundry centrifuge driers and centrifuge washing machines with a dry mass loading capacity not exceeding 7 kg. (excluding parts thereof)	5%
84.19	Dish washing machines (excluding parts thereof)	5%
84.40	1 Laundry washing machines with a dry mass loading capacity not exceeding 7 kg. (excluding parts thereof)	5%
	2 Ironing or pressing machines (domestic type), electrically heated (excluding parts thereof)	5%
85.06	Electro-mechanical domestic appliances, with self-contained electric motor (excluding parts thereof)	5%
85.12	2 Electric instantaneous or storage water heaters and immersion heaters (excluding heaters of a kind designed for industrial use); electric space heating apparatus; electric smoothing irons; electro-thermic domestic appliances (excluding, in each case, parts of such articles)	5%
89.01	Ships and boats (excluding hovercraft, warships, lifeboats, scientific research vessels and hydrographical survey vessels and ships and boats of a kind used for grain)	10%
91.01	Pocket-watches, wrist-watches and other watches, including stop-watches (excluding Braille-watches)	15%
91.02	Clocks with watch movements (excluding instrument panel clocks and clocks of a similar type, for vehicles, aircraft or vessels)	15%
91.04	Other clocks classified within this tariff heading in Part 1 of this Schedule (excluding tower, astronomical and observatory clocks	15%
92.01 to 92.09	2 Pianos and organs	5%
	3 Other	10%
97.00	2 Other (excluding parts thereof)	10%

EDB ext. 471/472/473/462

Customs tariff applications

Customs Tariff Application List No. 638, published in the South African *Government Gazette* of 23 August 1974, contains an application to the Board of Trade and Industries for increase in duty on:

Certain woven fabrics of synthetic and cellulosic fibres.

Customs Tariff Application List 639, published in the South African *Government Gazette*, 30 August 1974, contains an application to the Board of Trade and Industries for increase in duty on:

Printed woven fabrics of man-made fibres and cotton/man-made fibres and

Polyacrylamide flocculating agents (anionic and nonionic).

British trade organisations thought to be interested in the application are being informed. Any British firm affected which wishes to make representations to the South African Board of Trade and Industries and belongs to a trade organisation should, therefore, first contact its own trade association.

If any firm proposes to make independent representations to the South African authorities and requires further information concerning the application, it should address inquiries to Commercial Relations and Exports Department. **CRE ext. 5274**

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EDB Export Data Branch, Export Services Division
Tel. 01-248 5757 (extension at end of each notice)

Pakistan

Commonwealth preferences: staged elimination

The Government of Pakistan has announced its decision to phase out preferences accorded to British goods in three stages:

From 1 July 1974 all margins of preference of 6 per cent of less were abolished.

On 1 July 1975 margins of preference over 6 per cent will be halved.

On 1 July 1976 remaining margins of preference will be eliminated.

The products at present affected include tinned steel sheets, refrigerators, certain cotton textiles, drug ingredients, and vitamins.

EDB ext. 420/475

Bangladesh

Registration of trade marks

A notice published in *Trade and Industry*, 4 July 1974, and in previous issues stated that, in accordance with the Trade Marks (Invalidation and Summary Registration) Order 1973, trade marks registered in Pakistan before 26 March 1971 shall be deemed not to have been registered in Bangladesh unless re-applied for and registered within one year of the commencement of the above order. The date of the commencement of the order was 15 March 1973. Under the Trade Marks (Invalidation and Summary Registration) (Amendment) Ordinance 1974 the period for filing applications for registration in Bangladesh has been extended until 15 September 1974. Owners of trade marks registered in Pakistan before 26 March 1971 who have still not applied for registration in Bangladesh should therefore note that such applications will still be accepted up to 15 September 1974.

Application for registration in Bangladesh should be made to 1/4 Block 'B', Mohammadpur Housing Estate (opposite Shaheed Suhrawaby Hospital), Mirpur Road, Dacca, the fee payable being Taka 50.00.

A copy of the above Ordinance is available for consultation in the Chancery House Annexe of the Science Reference Library (Holborn Branch) Chancery House, Chancery Lane, London WC2A 1AY.

Singapore

Import of saccharin and photographic chemicals

Import and Export Notice No. 10/74 informs traders that:

(i) inward declarations for the import of saccharin (artificial sweetening agent) (SITC 512 751 BTN 29.26 100) must be accompanied by import licences issued by the Director of Food Administration, Ministry of the Enviromnent, before the declarations can be approved by the Import and Export Office.

(ii) inward declarations for photographic chemicals (SITC 862 300 BTN 37.08 000) must be endorsed by officers of the Director of Medical Services Singapore, stationed at the Import and Export Office, before the declarations may be processed.

EDB ext. 401/468/469

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Removal of import licence restrictions of goods subject to endorsements by other authorities

PART I

The following goods are no longer subject to import licensing but under the Control of Imports, Exports and Transhipments (Endorsement) Order 1974 they still require prior approval in writing by the competent authority as shown:

Alkyl benzenes	Director, Department of Trade
Amusement machines, coin or disc-operated, including pin-tables, shooting galleries, juke-boxes, cinematograph machines, and components and spare parts thereof	Public Entertainments Licensing Officer
Anise or star aniseed	Commissioner of Public Health, Ministry of Environment
Anionic surface-active agents and preparations	Chief Chemist
Apparatus based on the use of X-rays or of radiations from radio-active substances (including radiography and radio-therapy apparatus) and ancillary equipment	Chief Chemist
Industry safety belts, harnesses, safety lines and life lines	*SISIR to certify that specifications not below *BSS 1397:1963
Cyclamates, sodium and calcium and preparations containing any portion of either or both	Director of Medical Services
Dried bean curd or bean curd stick	Commissioner of Public Health, Ministry of the Environment
Franking machines	Postmaster-General
Fruit machines, jackpot machines, components and parts thereof	Commissioner of Estate Duties and Public Entertainments Licensing Officer
Hair spray	Chief Chemist
Helmets, crash	*SISIR to certify that specifications are not below *BSS 2001:1956
Helmets, heavy duty, industrial safety	*SISIR to certify that specifications are not below *BSS 2826:1957
Helmets, light duty, industrial safety	*SISIR to certify that specifications are not below *BSS 2095:1958
Mosquito coils	Chief Chemist
Motor vehicles, other than new, for the transport of persons	Director, Department of Trade
Multi-tone horns, hooters and sirens for motor vehicles	Director, Department of Trade
Nets, industrial safety	*SISIR to certify that specifications are not below *BSS 3913:1965
Parental contraceptive preparation – medroxyprogresterone acetate	Director of Medical Services
Preserved candied fruits of Taiwan origin	Commissioner of Public Health, Ministry of the Environment
Radar equipment	Telecommunication Authority of Singapore
Radio-active chemical elements and radio-active isotopes, and compounds, inorganic or organic of such elements or isotopes, whether or not chemically defined	Chief Chemist
Radio alarm	Telecommunication Authority of Singapore
Receivers	Telecommunication Authority of Singapore
Samsoo, medicated	Director of Medical Services
Straight-through silencers for motor vehicles	Director, Department of Trade
Toy walkie-talkie	Telecommunication Authority of Singapore
Transceivers, including ship's radio, radio telephone, walkie-talkie, ham radio, and paging equipment	Telecommunication Authority of Singapore
Transmitters	Telecommunication Authority of Singapore
Vaccines, live oral poliomyelitis (Sabin and other types)	Director of Medical Services
Weighing and measuring instruments	Director, Department of Trade
Wireless microphones	Telecommunication Authority of Singapore

*SISIR = Singapore Institute of Standards and Industrial Research
*BSS = British Standards Specifications.

PART II

Permits are required to import, export or tranship armorces (caps or igniting tapes for toy pistols); articles of clothing intended as protection against attack, including bullet-proof vests; steel helmets; toy guns including pistols and revolvers; and hand-cuffs. Prior approval in writing by the Commissioner of Police must be obtained.

Under the Control of Imports (Licensing) Order 1974 made on 9 July 1974, import licences (in addition to import permits) are still required for the import of:

a Rice including rice bran, from all sources.
b The following goods originating wholly or mainly in or consigned from Japan: Aluminium sheets, textile fabrics, machinery (steam generating boilers, boring, excavating, extracting or levelling machines, internal combustion engines, electric generators and motors, non-manual pumps, tractors), monosodium glutamate, sewing machines (including industrial).
c All goods originating in or consigned from Albania, Czechoslovakia, Cuba, East Germany, N. Vietnam, People's Republic of China and People's Republic of Mongolia.

Traders and carriers should obtain the prior approval of the competent authority before entering into any contract for the import, export or transhipment of these goods. **EDB ext. 401/468/469**

Thailand

Food additives, and labelling of food containing additives

The Thai Ministry of Public Health Notification No. 20 (BE 2517) gives information on the use of additives in certain foods and the labelling requirements of foods containing such additives.

Copies of the notification which comes into force on 1 December 1974 including the list of additives affected are available.

EDB ext. 401/468/469

Substances prohibited for use in food

The Thai Ministry of Public Health Notification No. 21 (BE 2517) announced that, with effect from 5 June 1974, the use of the following substances in food is prohibited:

1 Brominated vegetable oil
2 Salicylic acid
3 Boric acid
4 Borax
5 Calcium iodate and potassium iodate (except when they are used for the prevention and treatment of goitre)
6 Nitrofurazone
7 Potassium chlorate **EDB ext. 401/468/469**

Laos

Exchange control

The Laotian Government has decided to apply controls on foreign exchange transactions. Access to foreign exchange will now be limited to five commodities: chemical fertilizer, seeds, agricultural insecticide, milk, and sugar at the official rate of 600 kip to the US dollar and a somewhat larger number of commodities at the rate of 840 kip to the dollar. Details are available. **EDB ext. 420/427**

Philippines

Educational and technical books: compulsory reprinting

The President of the Republic of the Philippines has issued Decree 400 amending Decree 285 to authorise the compulsory reprinting of high-priced educational and technical books and publications. Books, pamphlets and other written materials, whether of local or foreign origin sold at P20 or above, are subject to reprinting. The resolution is to take effect immediately. **CRE ext. 5253/3348**

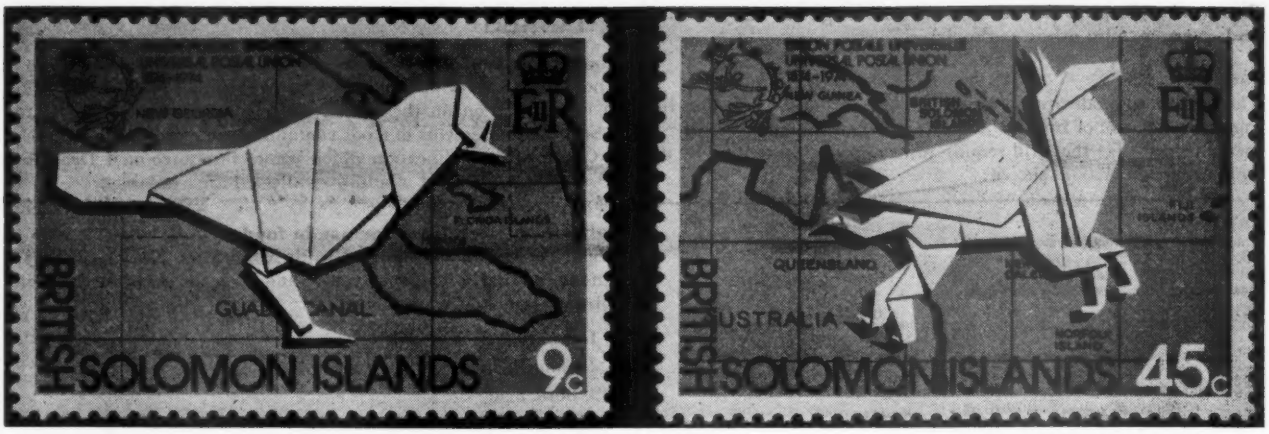
Japan

Food and drink regulations

The Japanese Food Sanitation Law sets out, among other things, a list of food additives whose use in food and drink for sale in Japan is permitted. The Japanese food and drink regulations include provisions for revising these and other food regulations. The provisions are set out in 'The Standards for Investigation and Discussion by the Food Sanitation Council on Registering Food Additives, and on Amending the Standards of the Usage thereof'. An extract of these provisions from the Food Sanitation Law Food Additives in Japan, translated by the Minister of Health and Welfare, is available to British exporters on request. **EDB ext. 420/475**

Registered trade marks

The lists of Tariff, Customs and Import Regulations changes in overseas countries published in this section of *Trade and Industry* sometimes contain words which are registered trade marks in the United Kingdom. So far as is practicable, all lists of goods are checked before publication from this point of view. Items which fall into this category are preceded by the letters rtm. Readers should note that this prefix signifies that the words are registered as trade marks in the United Kingdom but that in the present context are assumed to refer generally to products of the descriptions stated in brackets. While every attempt will be made to ensure that the scrutiny is complete, the lists may contain other words which are registered as trade marks in the United Kingdom or in other countries but which it has not been possible to identify.



Designs based on origami – folded paper – figures are featured on a new set of stamps to be issued by the British Solomon Islands to mark the centenary of the Universal Postal Union. The four values portray a postman (4c), a carrier-pigeon (9c), St. Gabriel, patron saint of telecommunications and philately (15c) and Pegasus (45c), winged horse fabled to be the favourite steed of the muses. The stamps were designed by Jennifer Toombs and lithography processed by Questa Colour Security Printers Ltd.

Australia

Collection of company tax

The Commissioner of Taxation, Sir Edward Cain, said in Australia on 2 August 1974 that legislation is now in force for collecting company tax by a system of quarterly payments in 1974-75 and succeeding financial years.

Most companies will be required to meet tax on 1973-74 income by three payments in 1974-75 – an instalment in November 1974, a further instalment in February 1975 and the balance on the due date for payment shown on the notice of assessment. For companies called upon to pay any instalment, the due date shown on the notice of assessment will not be earlier than 30 April 1975.

Where a notice of assessment based on 1973-74 income has been issued by the date of notification of an instalment, the instalment will be equal to one-quarter of the tax shown on the assessment notice. Otherwise the instalment will be equal to one-quarter of tax assessed on 1972-73 income. In the latter case, the company will be able to seek a variation of the instalment on the basis of its own estimate of the tax that will be payable on its 1973-74 income.

The Commissioner also said that notifications of instalments will not be made for amounts less than $250. Any company not called upon to pay instalments will be required to pay the whole of its tax on 1973-74 income on whatever due date for payment is shown on the notice of assessment.

In 1975-76 and each succeeding financial year, collection of company tax will follow the same pattern as in 1974-75 but an additional instalment of tax will be payable in the first quarter of the financial year. Ref. 27163/3 **CRE ext. 5318/5319**

Canada

Consumer packaging and labelling

The Department of Consumer and Corporate Affairs has announced proposed amendments to the regulations which are concerned with the geographical origin of a product.

Comments should be made by 17 September; details are available. **CRE ext. 5397**

Cargo control

The Department of Revenue has announced that the Canadian Customs computerised cargo control will be implemented on a pilot basis in Montreal during the current fiscal year. Entry processing sub-systems are also included in the scheme.

To facilitate the recording of data, information must be in standard locations on manifests, manifest abstracts, house waybills, advice notes, etc. Details of the requirements are available. **EDB ext. 455/456/457**

Men's and boys' shirts

The Canadian Textile and Clothing Board has undertaken to make a comprehensive inquiry into the situation in Canada regarding men's and boys' shirts. Interested parties are invited to submit views of information by 23 September. **CRE ext. 5397**

Portable oxygen administration units

The Canadian Department of Health and Welfare has issued Information Letter No. 425 which details proposed regulations to be established under the Food and Drug Act to control portable oxygen administration units, as many of the units on the market are considered unsuitable for medical or emergency use. The regulations would require certain mandatory equipment and warning statements on the surface of the portable oxygen container. The unit and container would also need to comply with the labelling requirements for medical devices and drugs. Comments of these proposals should be made by 8 October 1974. **CRE ext. 5397**

Antigua

Luxury goods: consumption tax cut

By Act No. 10 of 1974 the Antigua authorities have repealed the fourth schedule of the Consumption Tax Act, which listed luxury goods on which the rate of consumption tax was 17 per cent and will now be classified under the first schedule at 7 per cent. These products appeared in *Trade and Industry*, 28 February 1974, on page 367. **EDB ext. 7312/456/457**

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Statistics

The economy: selected indicators

Series expressed as index numbers and seasonally adjusted except where shown otherwise

	Gross domestic product (average estimate)	Consumers expenditure	Fixed capital expenditure			Changes in stocks				Balance of payments		
			Total	of which: Manufacturing industry	of which: Distributive and service industries	Total	of which: Manufacturing industry	of which: Wholesalers	of which: Retailers	Current balance	Visible balance	Invisible balance
	at 1970 prices		at 1970 prices			at 1970 prices				at current prices		
Base of index	1970	1970	1970	1970	1970							
£m in base year		31,404	9,223	2,130	2,089	series in £ million				series in £ million		
1969	99	98	98	95	92	416		42	33	445	−143	588
1970	100	100	100	100	100	257	324	68	−23	692	−9	701
1971	101	103	100	94	102	−7	−126	52	−4	1,073	285	788
1972	104	109	102	85	115	−394	−205	48	3	114	−677	791
1973	109	114	107	90	121	627	374	32	242	−1,286	−2,375	1,089
1971 4th qtr.	102	105	101	90	103	—	−37	3	17	248	60	188
1972 1st qtr.	101	106	103	90	107	−131	−62	17	−16	71	−121	192
2nd qtr.	104	108	102	84	115	−100	−106	1	38	112	−64	176
3rd qtr.	104	110	102	82	115	−83	−42	6	−13	−116	−284	163
4th qtr.	106	111	102	83	123	−80	7	24	−6	+2	−208	210
1973 1st qtr.	109	115	109	89	126	242	146	11	32	−146	−351	205
2nd qtr.	109	113	102	86	112	188	61	−9	163	−188	−399	211
3rd qtr.	110	114	109	91	120	102	68	6	22	−291	−606	315
4th qtr.	109	114	108	94	124	95	99	24	25	−661	−1,019	358
1974 1st qtr.	106	112	109	98	111	−265	−100	8	−73	−979	−1,288	309
2nd qtr.				97	106		98	50	17			
% change last 2 qtrs. on prev. 2 qtrs.	−1.7	+0.1	+2.6	+5.3	−11.5							
on a year earlier	N/C	+3.0	+2.6	+11.5	−9.2							

	Index of industrial production		Personal expenditure		Prices and costs					Labour			Trade§	
	Total all industries	Total manufacturing industries	Retail sales	Cars: new registrations	Index of retail prices		Index of wholesale prices: all manufacturing industry: basic materials and fuel used‡	Index of wholesale prices: all manufacturing industry: manufactured products: home sales‡	Basic hourly wage rates of manual workers (all industries and services)‡	Unemployed excluding school leavers and adult students		Unfilled vacancies for adults	Exports	Imports
				monthly averages	Index‡	% increase on a year earlier				mid-month count	% of total employees	mid-month count	monthly averages	
Base of index	1970	1970	1971		Jan 16, 1962		1970	1970	July 31, 1972				Series in £ million	
£m in base year			15,895	thousands						thousands		thousands		
1970	100.0	100.0	99.0	91.4	140.2	6.4	100.0	100.0	78.5	568	2.5	186	658	659
1971	100.4	99.6	100.0	108.5	153.4	9.4	104.6	109.0	88.9	737	3.2	129	733	709
1972	102.4	102.0	105.8	138.6	164.3	7.1	109.2	114.8	101.4	816	3.6	145	761	818
1973	109.8	110.3	110.7	137.3	179.4	9.2	144.4	123.2*	115.5	581	2.6	304	953	1,151
1972 3rd qtr.	103.0	102.4	107.2	139	165.4	6.5	109.4	115.6	102.2	808	3.6	147	684	779
4th qtr.	105.9	105.7	109.5	144	169.4	7.7	115.6	118.0	107.8	750	3.3	179	871	940
1973 1st qtr.	110.4	110.7	111.8	152	172.4	8.0	126.0	119.5	108.8	667	2.9	228	878	995
2nd qtr.	109.4	109.4	108.0	136	177.9	9.3	133.3	120.1*	112.6	605	2.6	289	931	1,064
3rd qtr.	110.3	110.9	110.5	143	180.2	9.2	150.8	124.2	118.4	562	2.5	334	995	1,197
4th qtr.	109.2	110.3	112.3	119	186.8	10.3	167.6	129.1	120.9	489	2.2	364	1,008	1,348
1974 1st qtr.	103.0	105.3	110.1	103	101.4†	12.9	205.1	138.4	124.9	543	2.4	285	1,124	1,558
2nd qtr.			107.1	104	107.5	15.8	209.8 p	148.8 p	130.8	552	2.4	309	1,281	1,736
1973 July	110.4	110.7	110.6	147	179.7	9.4	145.3	122.7	116.0	581	2.6	324	961	1,145
Aug.	109.7	110.4	110.8	153	180.2	8.9	152.5	124.1	119.7	563	2.5	330	980	1,206
Sept.	110.8	111.6	110.2	129	181.8	9.3	154.7	125.8	120.0	542	2.4	349	1,043	1,239
Oct.	111.3	112.0	111.7	127	185.4	9.9	161.7	127.7	120.3	512	2.3	363	982	1,385
Nov.	110.1	111.8	112.3	126	186.8	10.3	166.0	129.0	121.0	486	2.2	368	1,022	1,304
Dec.	106 3	107.1	112.9	103	188.2	10.6	175.1	130.6	122.0	470	2.1	362	1,019	1,364
1974 Jan.	100.0	100.8	109.5	93	191.8	12.0	202.4	134.1	123.7	535	2.4	304	1,012	1,396
Feb.	102.9	106.8	110.3	109	101.7†	13.2	205.5	138.5	124.7	549	2.4	278	1,153	1,599
Mar.	106.1	108.3	110.4	106	102.6	13.5	207.3	142.2	126.4	545	2.4	274	1,208	1,680
Apr.	108.4	109.9	107.9	96	106.1	15.2	208.5	146.3	127.0	546	2.4	297	1,250	1,661
May	108.7	108.7	105.4	105	107.6	15.9	211.3	148.9	130.8	548	2.4	314	1,266	1,745
June	108.7	109.4	108.1	111	108.7	16.5	209.6 p	151.1 p	135.4	561	2.5	317	1,325	1,802
July			109 p	116	109.7	17.1	210.1 p	153.4 p	137.3	582	2.6	317	1,327 p	1,805 p
Aug.										606 p	2.7	298 p		
% change latest 3 months on prev. 3 months	+5.5	+3.8	−1.9	+6.8	+5.1		+1.6	+6.2	+5.5	+6.6		+5.5	+8.5	+8.3
on a year earlier	−0.7	−0.1	−1.4	−20.2	+16.6		+52.0	+24.5	+15.6	+0.7		−2.6	+39.2	+58.2

(‡) Not seasonally adjusted. (§) On a balance of payments basis. * After April 1973, affected by changes due to VAT. † Base of index Jan 1974 = 100.

Energy trends: energy use down in 1974 but increased consumption of natural gas

Energy consumed in the UK during June was 3.5 per cent less than in June 1973. This is the seventh successive month in which energy use has fallen below that in the corresponding period of the previous year.

However, whilst consumption of coal and oil was consistently lower in the first half of 1974 than in the same period of 1973, the use of natural gas increased by 22.5 per cent.

Energy Trends, the Department of Energy's new monthly statistical bulletin, published on 29 August, suggests that the second quarter drop in energy consumption of 4.5 per cent on the second quarter of 1973, may have been due to a number of factors, including:

- the high level of oil prices.
- the continuation of energy saving practices introduced during three-day-week working, and
- continuing difficulties with coal supplies during the industry's recovery following the miners' strike.

Coal production looking better

Coal production during July was three per cent below a year ago. *Energy Trends* states that this represents an improvement on the June performance when production was down more than nine per cent on the June 1973 figure. Deep-mined production in July was only 1.5 per cent below the July 1973 level.

Total recorded coal stocks, in July, increased by just over 400,000 tons with power station stocks rising by 700,000 tons to 11.9 million tons.

Although colliery recruitment was still well up on last year's level, there was a net rundown in manpower during July for the first month since the mine-workers' pay settlement.

Million tons

Coal	May 1974	June 1974	July 1974	July 1973
Production	10.4	11.7	8.7	9.0
Undistributed stocks	7.6	7.3	6.9	13.4
Power station stocks	9.9	11.2	11.9	19.3

Petroleum product exports

During May, net exports of refined petroleum products by the UK reached 0.5 million tons – the first time this year that exports have exceeded imports.

Energy Trends suggests that price rises and low economic activity have led to depressed demand for petroleum products in the UK so far this year. Deliveries in the first six months were down by 9.5 per cent compared with the first half of 1973.

In June, deliveries of motor spirit were 6.4 per cent below a year earlier, continuing a trend of declining consumption.

Oil stocks held by oil companies at the end of July stood at 25.2 million tons or 103 days' supply.

Million tons

Oil	May 1974	June 1974	July 1974	July 1973
Companies' stocks (days supply in brackets)	23.1 (101)	24.9 (108)	25.2 (103)	Not available
Power station stocks	0.83	0.80	0.78	Not available

Increased electricity generating capacity

Of the extra 1,100 megawatts (MW) added to the CEGB's generating capacity during June, 950MW were accounted for by two new units at the coal burning Drax power station in Yorkshire.

A one per cent increase in electricity sent out during June (compared with June 1973) was the first increase registered since November 1973.

Energy Trends is prepared by the Economics and Statistics Division of the Department of Energy. Copies are available, free, from: Information Division, Department of Energy, Room 1203, Thames House South, Millbank, London S.W.1.

Symbols used in all statistical tables

.. not available	r revised
— nil or less than half	* five week period
the final digit shown	ø fifty-three week
p provisional	period

Business Monitor

The following titles and issues of Business Monitor are now available.

Production series

Quarterly at 37½p each a year post free:

PQ 271 General chemicals for first quarter 1974
PQ 271.2 Organic chemicals, total production in the United Kingdom of selected chemicals for second quarter 1974
PQ 331 Agricultural machinery (except tractors) for first quarter 1974
PQ 339.7 Food and drink processing machinery and packaging and bottling machinery for first quarter 1974
PQ 349.1 Ball, roller, plain and other bearings for second quarter 1974
PQ 367 Radio, radar and electronic capital goods for first quarter 1974
PQ 417.1 Hosiery and other knitted goods for first quarter 1974
PQ 417.2 Warp knitting for first quarter 1974
PQ 489 General printing and publishing for third and fourth quarters 1973
PQ 491 Rubber manufactures for fourth quarter 1973

Annual

1971 Census of Production Reports (price including postage shown in brackets):

PA 216 Sugar (27½p)
PA 221 Vegetable and animal oils and fats (27½p)
PA 232 Soft drinks (27½p)
PA 275 Soap detergents (27½p)
PA 279.5 Printing ink (27½p)
PA 414 Woollen and worsted (27½p)
PA 422.2 Canvas goods and sacks, etc (27½p)
PA 473 Bedding and soft furnishing (27½p)
PA 483 Manufactured stationery (27½p)

Service and distributive series

Quarterly at 37½p a year post free:

SD 7 Assets and liabilities of finance houses for second quarter 1974

Business Monitors in the Production, Service and Distributive and Miscellaneous series are normally available by annual subscription from Her Majesty's Stationery Office, PO Box 569, London SE1 9NH. The Census of Production reports are available on standing order from the same address or can be purchased separately from the Government Bookshops or through booksellers.

Exceptionally copies can be purchased over the counter at either the Department of Industry Central Library, 1 Victoria Street, London SW1H 0ET, or at the Department's Statistics and Market Intelligence Library, Export House, 50 Ludgate Hill, London EC4M 7HU. Copies of specific issues (including back issues) can be ordered by post (payable in advance) from the Department's Central Library, which will supply prices on request (tel: 01-222 7877, ext. 3038) or the Department's Library at the Business Statistics Office, Cardiff Road, Newport, Gwent, NPT 1XG (tel: 0633-56111 ext. 2793; Telex 497121/497122 – Answer back BSO Newport), from which a complete list of titles of Business Monitors is available on application.

Inquiries about the distribution of Business Monitors may be made to the Business Statistics Office (ext. 2700) whose address and telephone number appear above.

Guide to the Departments of

Industry

Trade

Prices and Consumer Protection

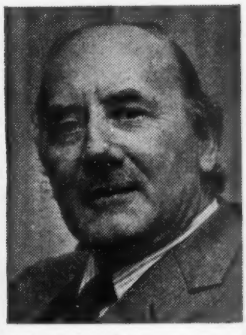
No. 2

The Department of Industry

The Department is responsible for general industrial policy, and for the industrial component of regional policy, including financial assistance to industry under the Industry Act. It sponsors individual manufacturing industries, including iron and steel, aircraft and shipbuilding; it is responsible for two nationalised industries, the British Steel Corporation and the Post Office. The Department is responsible for technical services to industry, and for industrial research and development, including civil aerospace research and the supervision of the industrial research establishments of the former Department of Trade and Industry. The Design Council and the National Research Development Corporation also come within its sphere.

Secretary of State for Industry

Anthony Wedgwood Benn



Minister of State

Lord Beswick
(also Department's spokesman in the House of Lords)

Parliamentary Under-Secretary of State

Michael Meacher

1 General manufacturing industry
2 Chemicals and textiles
3 Shipbuilding policy
4 Metals, electrical engineering, process plant and industrial technology
5 Mechanical engineering
6 Computers, systems and electronics
7 Iron and steel
8 Industrial R & D
9 Aircraft industry, including aerospace

Mr. Meacher has special responsibility for items 1-6, reporting to Lord Beswick. Lord Beswick has special responsibility for items 7-9, although Mr. Meacher, together with the Secretary of State, speaks on these subjects in the House of Commons.

Minister of State

Eric Heffer

Parliamentary Under-Secretary of State

Gregor MacKenzie

1 Industry Act
2 National Enterprise Board
3 Planning Agreements
4 Regional policy
5 Regional industrial finance
6 Regional industrial distribution
7 Regional development grants
8 Investment grants
9 Regional offices
10 Small firms

Mr. MacKenzie has special responsibility for items 4-10, reporting to Mr. Heffer. He also has special responsibility for posts and telecommunications affairs, reporting direct to the Secretary of State.

Department of Industry: Headquarters Organisation

Permanent Secretary: Sir Antony Part
The following Deputy Secretaries report direct to Sir Antony Part – Dr. I. Maddock, Mr. D. le B. Jones, Mr. M. J. Kerry, Prof. A. T. Peacock, Mr. L. S. Berman, Mr. D. A. Lovelock and Mr. A. Lord (except for Industrial Planning Division).

Secretary (Industry): P. W. Carey
The following Deputy Secretaries report to Mr. Carey – Mr. R. F. Prosser, Mr. G. S. Stone, Mr. R. H. W. Bullock and Mr. A. Lord (for Industrial Planning Division only).

The chart below is not intended to show the relative status of the posts.

Deputy Secretary	Division or Department		Head of Division
R. F. Prosser*	Regional Industrial Development	RID	M. H. M. Reid
	Regional Industrial Finance	RIF	A. J. Lippitt
	Regional Development Grants	RDG	J. E. Barnes
	Small Firms	SF	J. E. Barnes
G. D. W. Odgers (acting) Director, Industrial Development	Managerial and Technical Services	IDU	M. C. Ashworth
	Financial Services		J. G. Salkeld
	Monitoring		A. W. Kay
	Industry Studies		A. Gray
R. H. W. Bullock	Paper, Timber and Miscellaneous Manufactures Branch	PTM	J. E. Barnes
	Chemicals and Textiles	CT	P. W. Ridley
	Shipbuilding Policy	SBP	E. V. Marchant
	Minerals, Metals, Electrical Engineering, Process Plant and Industrial Technologies	MEPT	D. C. Clark
	Mechanical Engineering	M	D. N. Byrne
	Computers, Systems and Electronics	CSE	M. P. Lam
	Iron and Steel	IS	S. J. Gross
I. Maddock Chief Scientist	R & D Requirements	RR	B. W. Oakley
	R & D Contractors	RC	J. W. Nichols
	Air	Air	A. Warrington
D. le B. Jones	Space and Air Research	SAR	H. G. R. Robinson
	Concorde	Concorde	K. G. H. Binning
	Posts and Telecommunications	PT	D. G. C. Lawrence
M. J. Kerry The Solicitor	Overseas Trade and ECGD	Sol A	T. D. Salmon
	Domestic Commercial Law; Industry Bill; Aerospace; Posts and Telecommunications; Consumer Affairs and Prices	Sol B	W. C. Beckett
	Prosecutions and Investigations	Sol C	J. A. Trapnell
	Industry and Industrial Assistance	Sol D	*Assistant Solicitors* W. T. Benyon R. Higgins
Prof. A. T. Peacock Chief Economic Adviser	Economics and Statistics 1	EcS1	D. R. H. Sawers
	Economics and Statistics 3	EcS3	P. M. Rees
L. S. Berman Director of Statistics	Economics and Statistics 4	EcS4	R. O. Goss
	Economics and Statistics 5	EcS5	T. Paterson
	Economics and Statistics 6	EcS6	Miss R. J. Maurice
	Business Statistics Office	BSO	M. C. Fessey
D. A. Lovelock Principal Establishment Officer	Establishment Senior Staff Management	SSM	G. Parker
	Establishment Personnel	EP	D. N. Charlish
	Establishment Management Services and Manpower	EM	G. C. Lowe
	Establishment General Services	EG	J. Fish
A. Lord Principal Finance Officer	Finance and Economic Appraisal	FEA	H. Scholes
	Accountancy Services	AccS	H. A. Parfitt
	Industrial and Commercial Policy	IC	Miss A. E. Mueller
	Industrial Planning	IP	R. E. Dearing
	Information †	Inf	R. J. J. Tuite
	Parliamentary Branch ‡	PB	Miss P. A. Davey

Industrial Advisers
S. Baker, (Co-ordinator)
P. R. Weigall, G. D. W. Odgers

* The Regional Directors and Directors for Scotland and Wales, as well as the Industrial Directors in the Assisted Areas, also report to Mr. Prosser.
† Reports direct to Sir Antony Part. ‡ Reports to the PPS to the Secretary of State for Industry.

London addresses

Code	Address	Telephone	Telex
V	1 VICTORIA STREET, SW1H 0ET	01-222 7877	27366 and 917929
AB	Abell House, John Islip Street, SW1P 4LN	01-834 4422	
CS	Chapter Street House, 26 Chapter Street, SW1P 4NS	01-834 7032	
DB	Dean Bradley House, 52 Horseferry Road, SW1P 2AG	01-212 7676	
HH	Hillgate House, 26 Old Bailey, EC4M 7HU	01-248 5757	
K	Kingsgate House, 66-74 Victoria Street, SW1E 6SJ	01-222 7877	27366
MH	Monsanto House, 10-18 Victoria Street, SW1H 0NQ	01-222 7877	27366
MT	Millbank Tower, Millbank, SW1P 4QU	01-834 2255	918829
SM	Shell Mex House, Strand, WC2R 0DP	01-217 3000	22119
TH	Thames House South, Millbank, SW1P 4QJ	01-222 7000	
WB	Waterloo Bridge House, Waterloo Road, SE1 8UA	01-275 3000	

Regional offices are given on page 6.
Each Divisional entry overleaf includes an address code to indicate its location.

1-1 Regional Industrial Development MT
Industrial aspects of regional development. Designation of Assisted Areas. Regional policy in relation to the EEC. Liaison with departmental regional offices.

1-2 Regional Industrial Finance MT
Responsibility for regional selective assistance under Section 7 of the Industry Act 1972 and for financial assistance under the Local Employment Act 1972 (excluding Sections 7-9 incl.). Industrial Development Certificates. Building and leasing of factories through the Industrial Estates Corporations. Promotion of Assisted Areas. Inward investment.

1-3 Regional Development Grants MT
Administration of regional development grants under the Industry Act 1972, and residual work on investment grants under the Industrial Development Act 1966.

1-4 Small Firms AB
The focal point within Government where the needs of small firms can be seen as a whole. Matters arising from the Bolton Committee Report. Policy on and central management of Small Firms Information Centres.

1-5 Industrial Development Unit MT
Particularly concerned with the needs of industrial development and their solution. Appraisal of cases for selective financial assistance under Part II of the Industry Act 1972.

1-6 Chemicals and Textiles MT
Sponsorship of cotton and wool textiles, man-made fibres, clothing, leather, footwear, tobacco, chemicals, rubber, plastics, fertilisers, proprietary medicines, toiletries and sundry related industries.

1-7 Computers, Systems and Electronics DB
Sponsorship of the electronics industry (telecommunications, scientific instruments for industrial process control but not numerically controlled machines) and the computer and computer peripheral industries, including software.

1-8 Mechanical Engineering AB
Sponsorship of the motor vehicle, metal and woodworking machine-tool, agricultural machinery, construction and mechanical handling equipment, welding and manufacturing machinery, and other mechanical engineering products industries.

1-9 Minerals, Metals, Electrical Engineering, Process Plant and Industrial Technologies MT
General policy on mineral development in the UK. Questions of world demand and supply of non-ferrous metals. Sponsorship of non-ferrous metals industries and electrical engineering and process plant engineering and contracting industries. Promotion of industrial technologies (tribology, terotechnology, corrosion and protection, mechanical handling) and of low-cost automation, and sponsorship of mechanical handling and related industries.

1-10 Paper, Timber and Miscellaneous Manufactures Branch AB/MT
Sponsorship of paper, timber, board, and miscellaneous manufactures industries, including pottery, glass, cutlery, furniture, etc.

1-11 Shipbuilding Policy MT
Sponsorship of the shipbuilding, ship-repairing, marine equipment and civil hovercraft industries.

1-12 Iron and Steel TH
Policy relating to the iron and steel industry. Administration of the Iron and Steel Acts. BSC organisation, borrowings, investment and closures. Sponsorship of the private sector iron and steel industry and the foundry industry.

1-13 Space and Air Research MH
Technical and financial policy concerning Government-sponsored civil aircraft research, covering airframes, aero-engines and equipment. Sponsorship of space and aircraft equipment industries. Policy and financial responsibility for the National Space Technology Programme and associated research programme. UK representation in the European Space Conference, ELDO and ESRO (for application satellite programmes).

1-14 Air MH
Sponsorship of the aircraft and aero-engine industries. Ownership and structure of the UK aircraft industry. Government shareholdings in Rolls-Royce (1971) Ltd. and Short Brothers and Harland Ltd. Government investment in civil aircraft and aero-engine projects, including RB211 financing. International matters in the aircraft and aero-engine fields, including civil aircraft and aero-engine exports. Technical and market assessment of current and possible future civil aircraft and air transport systems.

1-15 Concorde MH
Concorde policy and administration.

1-16 Research and Development Requirements AB
Servicing the Requirements Boards set up to determine the objectives of the Department's research and development programmes and the broad allocation of funds, and to commission R & D work. Sponsorship of research in marine technology and materials; Department interest in Government-financed research in universities, research councils and other departments.

1-17 Research and Development Contractors AB
Consideration of the responsibilities and problems of public sector contractors, especially those of the industrial research establishments (*see facing page*). Allocation and co-ordination of authorised programmes. Dealing with National Research Development Corporation, Design Council and Queen's Award to Industry (technology section). Research Divisions' interests in overseas science and technology and technical information services. Provides information on overseas science and technology,

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Scientific Counsellor reports, German engineering guide lines (VDI Richtlinien), etc. Promotion of the Department's interests in technological manpower, engineering design, Council of Engineering Institutions and the professional institutions. Negotiation of qualifications for freedom of employment in the EEC.

Technology Reports Centre (St. Mary Cray, Orpington, Kent BR5 3RF. Tel: Orpington 32111).
Information service for industry on UK government and overseas R & D, operates 'Techlink', a selective dissemination service, operates a console linked to the ESRO/ELDO data banks, and other computer retrieval systems.

1-18 Research Establishments, etc.

National Physical Laboratory (Teddington, Middx. Tel: 01-977 3222, Telex 262344).
Metrology, standards, materials studies, computer science, aerodynamics, acoustics, ship hydrodynamics.

National Engineering Laboratory (East Kilbride, Glasgow G75 0QU. Tel: East Kilbride 20222, Telex 77588).
Engineering structure and materials, fluids, manufacturing systems.

Warren Spring Laboratory (Gunnels Wood Road, Stevenage, Herts SG1 2BX. Tel: Stevenage 3388, Telex 82250).
Chemical and process engineering, mineral processing, environmental pollution.

Laboratory of the Government Chemist (Cornwall House, Stamford Street, London SE1 9NQ. Tel: 01-928 7900).
Analytical services to Government departments, food chemistry, pesticide residues, environmental pollution.

Pesticide Residue Analysis Information Service (Cornwall House, Stamford Street, London SE1 9NQ. Tel: 01-928 7900).

Computer-aided Design Centre (Madingley Road, Cambridge CB3 0HB. Tel: Cambridge 63125).
Development of computer-aided design systems for chemical, mechanical, electrical, electronic and civil engineering, building, construction and industrial design.

1-19 Industrial Advisers V

Provide industrial advice for Ministers and senior officials over the whole range of the Department's activities, and beyond to other Departments and to NEDO, the British Overseas Trade Board, etc. Centrally based, the advisers have generally been directors of large companies. Each has experience of general management and more specific experience in specialised fields, and they work within Government for about two years.

1-20 Industrial and Commercial Policy V

Focal point for the Department's interest in economic, financial, fiscal, industrial, social and environmental policies. Also provides some common services for the Department of Trade.

1-21 Industrial Planning MT

Work on the Government's industrial policy with special reference to the proposals for the introduction of planning agreements, the creation of the National Enterprise Board and the revision of the Industry Act.

1-22 Accountancy Services HH

A common service of the Department for all accountancy questions.

1-23 Information V

The Departments of Industry, Trade, and Prices and Consumer Protection have their own Information Divisions which are responsible for the public presentation of Departmental business and publicity services generally. The Department of Industry is responsible for the common information services which cover briefing, paid publicity, external and internal publications and the EEC Information Unit (*see page 14*).

1-24 Economics and Statistics V

Economic and statistical analysis and advice; forecasts and special studies to assist in formulating economic and industrial policies; data collection and processing. There are five divisions providing a common service to the Departments of Industry, Trade and Prices and Consumer Protection. They are: industrial, regional, shipping, aviation and aerospace economics (EcS1); manufacturing industry – monitoring and assessment (EcS3); home economy – economics and statistics (EcS4); international trade and balance of payments (EcS5); financial, shipping, distribution and research and development statistics (EcS6).

Business Statistics Office (Cardiff Road, Newport, Mon., NP7 1XG. Tel: Newport 56111).
The principal Government agency for collecting and processing statistics from business firms.

1-25 Establishment V

There are four divisions which provide common services to the Departments of Industry, Trade, Prices and Consumer Protection: Senior Staff Management – personnel management above Principal level; Establishment Personnel – personnel management Principal level and below; Establishment Management Services and Manpower – organisation policy, management services, manpower forecasts, complementing and staff inspection; Establishment General Services - establishment matters common to all classes, office services, libraries and industrial staff, focal point for Parliamentary Commissioner for Administration cases and Race Relations Board cases.

Statistics and Market Intelligence Library XH
A public reference library of material on overseas markets including large collections of economic and general statistics, catalogues of foreign manufacturers, overseas development plans, and overseas trade and telephone directories.

1-26 Finance and Economic Appraisal AB

General financial policy and control for the Department of Industry and also, as a common service, for the Depart-

ments of Trade and of Prices and Consumer Protection. Co-ordination and preparation of the Estimates and PESC forecasts. Development and application of criteria for evaluation of current and proposed expenditure and of the effectiveness of the expenditure programmes. Liaison and co-ordination for Exchequer and Audit Department, Public Accounts Committee and Select Committee on Expenditure. Control of accounts work and internal audit.

1-27 Solicitor's Department **K**

Acts as adviser on legal matters involved in the work of the Departments of Industry, Trade, and Prices and Consumer Protection and the Export Credits Guarantee Department. It is responsible for drafting all subordinate legislation, and for prosecutions arising from Department-administered Acts. There are four divisions. Division A – overseas trade and ECGD; Division B – domestic commercial law, Industry Bill, aerospace, posts and telecommunications, and consumer affairs and prices; Division C – prosecutions and investigations; Division D – industry and industrial assistance.

1-28 Parliamentary Branch **V**

Responsible for co-ordinating all parliamentary work for the Departments of Industry, Trade and Prices and Consumer Protection – public and private Bills, subordinate legislation, Parliamentary Questions, etc. The Branch also acts for the Department of Energy in the processing of legislation.

1-29 Posts and Telecommunications **WB**

Nationalised Industry Policy

Sponsorship of the Post Office's Postal, Telecommunications, Data Processing, and Giro and Remittance services: this includes borrowing and capital investment matters; tariffs; incomes policies; Board appointments; constitutional, legislation and land questions; Users' Councils appointments. Sponsorhip of Cable and Wireless Ltd.

Governmental aspects of international postal and telecommunications relations, including EEC, International Telecommunications Union (ITU) and Universal Postal Union (UPU) matters.

Regional and District Offices

The Department of Industry's main regional network is based on its 10 Regional Offices, eight of which are in England, and one each in Scotland and Wales. The Northern Ireland Department of Commerce in Belfast maintains close liaison with the Department on matters of common concern and interest.

The Regional Offices represent the Department in its dealings with industry, local authorities, the Regional Offices of other Government Departments and other local bodies and organisations. The Regional Offices are also responsible for administering selective assistance to industry in Assisted Areas and for other aspects of regional industrial development. Some activities are also undertaken by the Regional Offices on behalf of the Department of Trade, such as export promotion, while the Regional Offices also serve the Department of Prices and Consumer Protection and the Department of Energy.

In addition some parts of the work of these Departments are handled through specialist local offices. The main ones are the offices dealing with Regional Development Grants and the residual Investment Grants under the Department of Industry, and HM Coastguard, Mercantile Marine Offices, Marine Survey Offices and the Official Receivers in bankruptcy and company liquidation under the Department of Trade. The Export Credits Guarantee Department also has local offices. A chain of 10 Small Firms Information Centres has also been established by the Department of Industry; addresses of these offices are given on page 14 of this guide. At the time of going to press with this guide a certain amount of reorganisation was taking place in the regional structure, including some redistribution. Until this reorganisation is finalised we are using the old county boundaries to indicate division of geographical responsibility.

Small Firms Information Centres are listed on page 14

Scotland

Director for Scotland: E. J. D. Warne
Industrial Director, Scotland:

■ ● *Office for the whole of Scotland:* 314 St. Vincent Street, **Glasgow** G3 8XF (041-248 2855, Telex 77583).
□ Magnet House, 59 Waterloo Street, **Glasgow** G2 7BT (041-221 9833, Telex 77611).
Pegasus House, 375 West George Street, **Glasgow** G2 4LW (041-221 8971).

● *District Office for the Highlands and Islands and North East Scotland:* Caledonia House, 63/67 Academy Street, **Inverness** IV1 1LU (Inverness 30867).

Wales

Director for Wales: P. B. Hunt
Industrial Director, Wales: D. C. Simpson

■ ● *Office for the whole of Wales:* Government Buildings, Gabalfa, **Cardiff** CF4 4YL (Cardiff (0222) 62131, Telex 49267).
□ 24-26 Newport Road, **Cardiff** CF2 1SY (Cardiff (0222) 42611, Telex 49538).

District Office for North Wales: Government Buildings, Dinerth Road, **Colwyn Bay,** Denbs. (Colwyn Bay (0492) 44261).

Northern Ireland

R. J. Henderson, Assistant Secretary, Department of Commerce, Northern Ireland, acts as the equivalent of the Regional Director for the Department of Industry.

● *Office for the whole of Northern Ireland:* Chichester House, 64 Chichester Street, **Belfast** BT1 4JX (Belfast (0232) 34488, Telex 74578).

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North

Cumberland, Durham, Northumberland, Westmorland and the North Riding of Yorkshire

Regional Director: R. L. Sutton
Industrial Director: C. F. Herzberg

■● *Regional Office:* Wellbar House, Gallowgate, **Newcastle upon Tyne** NE1 4TR (Newcastle upon Tyne (0632) 27575, Telex 53178).

□ Queensway House, West Precinct, **Billingham,** Teesside TS23 2NF (Stockton-on-Tees (0642) 553671, Telex 58608).

● *District Office for Cumberland and Westmorland:* Town Hall, **Cockermouth,** Cumberland CA13 9NP (Cockermouth (090-082) 3498, Telex 64173).

North-West

Cheshire, Lancashire and High Peak District of Derbyshire (boroughs of Buxton and Glossop, urban districts of New Mills and Whaley Bridge, and rural district of Chapel-en-le-Frith)

Regional Director: Lady Bowden
Regional Industrial Director: A. W. Ward

■● *Regional Office:* Sunley Building, Piccadilly Plaza, **Manchester** M1 4BA (061-236 2171, Telex 667104).

□ St. Peter's House, Stanley Precinct, **Bootle,** Lancs L20 3LZ (051-922 4030, Telex 627162).

Yorkshire and Humberside

East and West Ridings of Yorkshire, City of York and Lincolnshire (parts of Lindsey only)

Regional Director: J. H. McEnery
Regional Industrial Director: A. R. M. Graham

■● *Regional Office:* Priestley House, 1 Park Row, **Leeds** LS1 5LF (Leeds (0532) 443171, Telex 557470).

West Midlands

Herefordshire, Shropshire, Staffordshire, Warwickshire and Worcestershire

Regional Director: J. K. L. Thompson

● *Regional Office:* Ladywood House, Stephenson Street, **Birmingham** B2 4DT (021-632 4111, Telex 337021).

East Midlands

Nottinghamshire, Derbyshire (except High Peak District), Leicestershire, parts of Lincolnshire (parts of Holland and of Kesteven, and City of Lincoln), Rutland and Northamptonshire

Regional Director: E. T. Watson

● *Regional Office:* Cranbrook House, Cranbrook Street, **Nottingham** NG1 1ES (Nottingham (0602) 46121, Telex 37143).

London and South-East

Greater London, Kent, Surrey, Sussex, Hampshire, Isle of Wight and part of Dorset (Poole MB only)

Regional Director: A. C. Coging

Regional Office: Cromwell House, Dean Stanley Street, **London** SW1P 3HY (01-828 4355, Telex 25991).
Branch Office: Concord House, London Road, **Croydon** CR9 2QB (01-684 9781).

South-West

Cornwall, Devon, Somerset, Wiltshire, Gloucestershire, Bristol and Dorset (except Poole)

Regional Director: L. I. Macbeth
Regional Industrial Director: C. E. Cannell

● *Regional Office:* The Pithay, **Bristol** BS1 2PB (Bristol (0272) 291071, Telex 44214).

■ *South-Western Industrial Development Office:* Phoenix House, Notte Street, **Plymouth** PL1 2HF (Plymouth (0752) 21891, Telex 45494).

East

Bedfordshire, Berkshire, Buckinghamshire, Essex, Hertfordshire, Oxfordshire, Cambridgeshire and Isle of Ely, County of Huntingdon and Peterborough, Norfolk and Suffolk

Regional Director: B. Feinstein

Regional Office: Cromwell House, Dean Stanley Street, **London** SW1P 3HY (01-828 6271, Telex 25991).
District Office for certain matters for Bedfordshire, Berkshire, Buckinghamshire, Hertfordshire and Oxfordshire: Market Place House, **Reading,** Berks RG1 2EN (Reading (0734) 581261).

■ Regional Industrial Director (in addition to Regional Director).
● Offices providing services for British exporters (services for British exporters in the London & South-East and Eastern regions are provided by the Department of Trade's headquarters' Export Services and Promotions Division).
□ Regional development grants only.

The Department of Trade

Overseas Trade

The Department is responsible for commercial policy and relations with overseas countries and is concerned with economic policies affecting the international position of the United Kingdom. It promotes United Kingdom commercial interests overseas, negotiates on trade and commercial matters, and administers United Kingdom protective tariffs. Under the direction of the British Overseas Trade Board, which was set up in January 1972, and has the Secretary of State for Trade as President, the Department promotes British exports, providing an export information service to industry and commerce, largely through the eight regional offices, and handling Government support for overseas trade fairs. The Export Credits Guarantee Department is a separate Department responsible to the Secretary of State for Trade, providing a credit insurance facility, and guaranteeing finance, for exported goods and services.

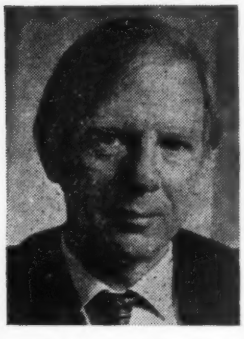
Shipping and Civil Aviation

The Department is the sponsor for the United Kingdom shipping and civil aviation industries including the conduct of international negotiations. It is also responsible for the regulation of marine safety.

The Department sponsors the British Airways Board, the British Airports Authority and the Civil Aviation Authority, and approves the capital investment of these bodies. In addition, the Department issues policy guidance to the Civil Aviation Authority and administers the Authority's annual grant until such time as full recovery of costs is attained.

Commerce and Industry

The Department is responsible in general for the basic legal framework for the regulation of industrial and commercial enterprises, administering a number of statutes governing company affairs and insolvency. It also holds general responsibility for company law, patent, trade mark and copyright matters, and for all matters affecting insurance. The Department of Trade is also the sponsor Department for tourism and the hotel and travel industries; the newspaper, printing and publishing industries; the film industry and the distributive and service trades.



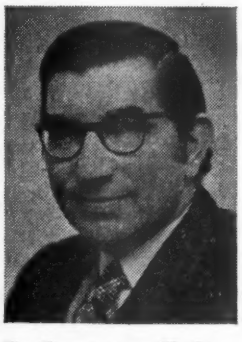
Secretary of State for Trade and President of the Board of Trade

Peter Shore

Overseas, trade policy, including EEC questions, commercial relations and tariffs
Export Credits Guarantee Department
British Overseas Trade Board
Tourism and hotel and travel industries
Newspaper, film and publishing industries
Distributive and service trades

Parliamentary Under-Secretary of State – Trade

Eric Deakins



Civil aviation, marine and shipping policy
Companies legislation
Insurance supervision
Insolvency service
Patent Office

Parliamentary Under-Secretary of State – Companies, Aviation and Shipping

Stanley Clinton Davis

Department of Trade: Headquarters Organisation

Permanent Secretary: Sir Peter Thornton

The chart below is not intended to show the relative status of the posts.

Deputy Secretary	Division or Department		Head of Division
R. Fell — **Export Credits Guarantee Department**	Medium and Long Term Guarantees	ECGD	K. W. Cotterill
	International Relations and Central Services		D. C. Smith
	Marketing and Comprehensive Guarantees		J. C. M. Mason
J. S. Rooke — **Chief Executive, British Overseas Trade Board**	Export Services and Promotions	ESP	W. K. Ward
	Overseas Finance and Planning*	OFP	D. N. Royce
	Special Adviser on Japanese Market		P. G. A. Wakefield
G. R. Denman	Commercial Relations and Exports 3	CRE3	G. Lanchin
	Commercial Relations and Exports 1	CRE1	S. Abramson
	Europe Industry and Technology	EIT	Miss K. E. Boyes
P. S. Preston	Commercial Relations and Exports 2	CRE2	S. L. Edwards
	Commercial Relations and Exports 4	CRE4	J. Caines
	Tariff	T	G. Lanchin
P. A. R. Brown	Patent Office	Pats	E. Armitage
	Insurance	I	M. S. Morris
	Companies	C	R. C. M. Cooper
	Insolvency Service	InsS	C. A. Taylor
	Printing, Publishing, Services and Distribution	PSD	Miss M. J. Lackey
D. F. Hubback	Civil Aviation 1 (Industry Policy and Safety)	CA1	P. G. Hudson
	Civil Aviation 2 (International Affairs)	CA2	G. T. Rogers
	Civil Aviation 3 (Airports and Noise)	CA3	S. D. Wilks
	Shipping Policy	SP	J. R. Steele
	Marine	MAR	J. N. Archer
	Chief Inspector of Accidents (Reports direct to Secretary of State)	AIB	W. H. Tench
	Information	Inf	N. Gaffin

* OFP reports to Mr. Denman in respect of export finance and ECGD and to Mr. Preston in respect of overseas aid and export licensing.

London addresses

Code	Address	Telephone	Telex
V	1 VICTORIA STREET, SW1H 0ET	01-222 7877	27366 and 917929
AD	The Adelphi, John Adam Street, WC2N 6BQ	01-217 3000	22119
AH	Aldermanbury House, Aldermanbury, EC2P 2EL	01-606 6699	883601
BR	2-14 Bunhill Row, EC1Y 7LL	01-606 4071	
CO	Companies House, 55-71 City Road, EC1Y 1BB	01-253 9393	886143
HH	Hillgate House, 26 Old Bailey, EC4M 7HU	01-248 5757	
IH	Inveresk House, 346 Strand, WC2R 0HJ	01-836 7733	
K	Kingsgate House, 66-74 Victoria Street, SW1E 6SJ	01-222 7877	27366
MT	Millbank Tower, Millbank, SW1P 4QU	01-834 2255	918829
P	Southampton Buildings, WC2 1AY	01-405 8721	
PS	Parliament Square House, 34-36 Parliament Street, SW1A 2ND	01-222 7060	24730
S	Sanctuary Buildings, 16-20 Great Smith Street, SW1P 3DB	01-222 7877	27366
SM	Shell Mex House, Strand, WC2R 0DP	01-217 3000	22119
SU	Sunley House, 90-93 High Holborn, WC1V 6LP	01-405 6911	264084
TM	Thomas More Building, Royal Courts of Justice, Strand, WC2A 2JY	01-405 7641	
XH	Export House, 50 Ludgate Hill, EC4M 7HU	01-248 5757	886143

Some activities are undertaken on behalf of the Department of Trade by the regional and district offices of the Department of Industry (see page 6).

Each Divisional entry overleaf includes an address code to indicate its location.

2-1 British Overseas Trade Board V

Directs export promotion work of Export Services and Promotions and Overseas Finance and Planning Divisions. Consists of businessmen and representatives of the Department, ECGD and the Foreign and Commonwealth Office, under the presidency of the Secretary of State for Trade and under the chairmanship of Lord Thorneycroft.

Exports to Japan Unit HH

Offers specialist advice on the Japanese market, and co-ordinates the export programme for Japan, including the British Export Marketing Centre.

2-2 Commercial Relations and Exports V

Protection of UK commercial interests overseas. Treaties and trade agreements with other countries, representations on commercial matters, etc. Trade questions arising from membership of the EEC. Assisted overseas by commercial departments of missions and consulates. There are four divisions, the first concerned with matters of general external policy including GATT and UNCTAD, and the others with individual countries and related general groupings.

Responsibility also for:

International Technological Collaboration Unit (Culham Laboratory, Abingdon, Berks. Tel: Oxford 41721, Telex: 83189).

Responsible for implementing technological collaboration agreements between Britain and other countries; assists in technological exchanges.

2-3 Europe, Industry and Technology V

Co-ordination of interests of Departments of Trade, Industry, and Prices and Consumer Protection on a wide range of matters relating to UK membership of the European Communities. Main policy responsibility for advice to industry and commerce on these subjects. Departmental link with Parliamentary Scrutiny Committees. Industrial and technological aspects of UK membership of EEC and co-ordination of Departmental work in this field. Technological relations with West European countries.

2-4 Overseas Finance and Planning V

Policy on general export promotion; planning and development of Department of Trade's export promotion activities. Co-ordination of Government support for capital projects overseas. Co-ordination of Department's interests in export credit and overseas aid. Arms exports and export licensing. Office of the Queen's Award to Industry.

Export Licensing Branch S

Issues licences under Import, Export and Customs Powers (Defence) Act.

2-5 Export Services and Promotions XH

Under the direction of the British Overseas Trade Board and working closely with British Diplomatic Service Posts abroad, provides, with the Export Sections of the Department of Industry's Regional Offices, advice, information and assistance to British companies engaged in overseas trading. Liaison with Technical Help to Exporters.

General Export Services Branch XH

Supply of information on overseas market prospects for particular goods and services. Help with business visits abroad and in making trade contacts overseas. Liaison with trade associations, etc. Export services for firms in the London and South Eastern Region and the Eastern Region.

Special Export Services Branch XH

Export Marketing Research Scheme. Arrangements for inward missions, VIPs and other business visitors from overseas. Home duty tours for Commercial Officers from overseas. Liaison with Export Clubs. European Components Service.

Export Data Branch XH

Export Intelligence Service (providing subscribers with details of specific export opportunities and market intelligence). Storage and assembly of information on markets and marketing methods. Information on overseas tariffs and import regulations. Commercial standing of overseas firms. 'Hints to Business men' publications.

Fairs and Promotions Branch HH

Supports collective participation at overseas trade fairs through the joint venture and British pavilion schemes. Organises all-British fairs, symposia, British Shopping Weeks and Store Promotions. Provides general information on trade fairs. Supports groups of British businessmen visiting overseas markets through the outward mission scheme.

2-6 Tariff K

General responsibility for managing the UK transitional protective tariff and administering provisions of the Import Duties Act for import duty questions arising from membership of the European Communities, anti-dumping policy and action, import licensing policy, etc.

Import Licensing Branch S

Administration of import licensing.

2-7 Export Credits Guarantee Department AH

A separate Government department, responsible to the Secretary of State, providing export credit insurance on a commercial basis for UK exporters against commercial and political risks incurred in selling overseas. Also insurance against political risks of new overseas investments. Represented in local offices throughout the UK and in New York.

2-8 Companies S

Review of companies legislation; EEC company law questions. Administration of the Companies Acts and related legislation; Prevention of Fraud (Investments) Act, Protection of Depositors Act, etc.; unit trusts; relations with the accountancy profession.

Consideration of applications for investigation and carrying out investigations of companies under Sections 164, 165, 172 and 334 of the 1948 Companies Act and inquiries under Sections 32 and 109 of the 1967 Companies Act.

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Companies Registration Office

Companies Investigation Branch **BR**

2-9 Insurance S

Administration of the Insurance Companies Acts including the authorisation and supervision of insurers; other matters affecting the insurance industry in Great Britain; matters affecting the overseas interests of British insurers including work in inter-governmental institutions, eg EEC, OECD and UNCTAD. Application of Counter Inflation Policy to insurance.

2-10 Insolvency Service BR

All aspects of insolvency administration, including the winding-up of companies under the Companies Acts and the failures of individuals under the Bankruptcy and Deeds of Arrangement Acts. Administration of the Official Receivers' service in the High Courts and provincial offices. Supervision of liquidators and trustees; accounting for and management of funds. Insolvency matters affected by EEC legislation and EEC Draft Bankruptcy Convention.

Official Receivers (High Court Offices)
Bankruptcy **TM**
Companies Winding Up **IH**

Official Receivers (Provincial offices) **BR**

2-11 Patent Office and Industrial Property and Copyright Department P

Registration of patents, designs and trade marks. Policy on these matters and on copyright (and Baskerville House, Browncross Street, New Bailey Street, Salford M3 5FU. Tel: 061-832 9571 – Trade marks and Designs only).

2-12 Printing, Publishing, Services and Distribution MT

Sponsorship of film industry, tourism, the printing, publishing, newspaper and book industries, distributive trades (other than food and drink), personal service trades and commercial agents.

2-13 Civil Aviation 1 SM

Sponsorship role in relation to British Airways Board and its airlines and the Civil Aviation Authority, including appointments to these bodies, administration of the CAA grant and other matters under the Civil Aviation Act 1971. The Civil Aviation Safety Adviser provides advice on civil aviation technical and operational safety matters.

2-14 Civil Aviation 2 SM

International relations and negotiations covering both scheduled and non-scheduled air services. Relations with international civil aviation bodies, notably ICAO, the European Civil Aviation Conference and the Commonwealth Air Transport Council.

2-15 Civil Aviation 3 AD

Concern with aircraft noise and nuisance. Policy towards British Airports Authority, non-State aerodromes, public safety zones at civil aerodromes, disposal of surplus civil aviation land and property, confirmation of compulsory purchase orders, road closures and bye-laws at aerodromes. Formulation of policy and co-ordination of action on civil aviation security.

2-16 Marine SU

Administration of merchant shipping legislation. Safety, construction and equipment (through Marine Survey Offices). Crew matters (through Mercantile Marine Offices and the Registry of Shipping), marine pollution, navigational aids, work in tidal waters, etc.

HM Coastguard **SU**

Co-ordination of marine search and rescue.

2-17 Shipping Policy AD

General policy questions affecting the UK merchant fleet including fiscal policy, investment incentives, defence considerations, and structure, profitability and economic health of the industry. International shipping policy issues including flag discrimination, the role of Governments in relation to shipping conferences, flags of convenience, law of the sea and various international conventions on shipowners' liability. Discussion and negotiation on such issues with other Governments either directly or in UNCTAD, IMCO, OECD and other international fora.

Sea Transport Branch **PS**

Responsible for provision of merchant shipping or shipping space to meet the needs of government departments. Deals with planning of sea transport operations. Provides shipping intelligence service.

2-18 Accidents Investigation Branch SM

The investigation, in the United Kingdom, of accidents in which any civil aircraft are involved and participation in other administrations' investigations elsewhere of accidents to British registered or manufactured aircraft. Reports direct to the Secretary of State.

2-19 Information

The Department of Trade maintains its own Press Office, but other information activities are undertaken as a common service by the Department of Industry (which see).

2-20 Accountancy Services; Economics and Statistics; Establishment; Finance and Economic Appraisal; Industrial and Commercial Policy; Parliamentary Branch; Solicitor's Department

All the above Divisions are provided as common services by the Department of Industry (which see).

The Department of Prices and Consumer Protection

The Department of Prices and Consumer Protection was set up in March 1974, under a Secretary of State, and took over responsibility from the former Department of Trade and Industry for policy on prices and consumer affairs, and from the Ministry of Agriculture, Fisheries and Food for policy on food prices.

Prices

The Department is the focal point for measures to deal with the generality of prices questions. It sponsors the Price Commission and has the principal responsibility for policy over the whole range of retail prices, including food prices, except for those of the nationalised industries. It has overall responsibility for policy on food subsidies, though other Departments undertake the detailed administration.

Consumer Protection

The Department deals with consumer affairs generally and is responsible for policy on fair trading, consumer credit, standards, weights and measures, and for monopolies, mergers and restrictive practices. The Director General of Fair Trading is appointed by the Secretary of State.

Secretary of State for Prices and Consumer Protection

Shirley Williams

Minister of State

Alan Williams

Consumer protection
Mergers and monopolies
Metrication
Consumer credit

Parliamentary Under-Secretary of State

Robert Maclennan

Prices
Liaison with local authorities
Commodity markets

Department of Prices and Consumer Protection: Headquarters Organisation

Permanent Secretary: K. H. Clucas

The chart is not intended to show the relative status of posts.

Deputy Secretary	Division or Department		Head of Division
J. C. Burgh, Prices	Prices Policy 1	PP1	R. W. Gray
	Prices Policy 2	PP2	Mrs. J. M. Archer
W. P. Shovelton, Consumer Protection	Fair Trading	FT	C. E. Coffin
	Standards, Weights and Measures	SWM	E. N. Eden
	Consumer Credit Branch	CCB	D. G. Hyde
	Information	Inf	Miss S. Jefferies
	Personnel (and General) Co-ordinator		Miss J. Blow

London addresses

Code	Address	Telephone	Telex
V	1 VICTORIA STREET, SW1H 0ET	01-222 7877	27366 and 917929
AB	Abell House, John Islip Street, SW1P 4LN	01-834 4422	
CS	Chapter Street House, 26 Chapter Street, SW1P 4NS	01-834 7032	

Some activities are undertaken on behalf of the Department of Prices and Consumer Protection by the regional and district offices of the Department of Industry (see page 6).
Each Divisional entry below includes an address code to indicate its location.

3-1 Prices Policy 1 — V

Policy on price control or supervision for all non-food goods and services; prices legislation; focal point for Departmental interest in prices and income policy.

3-2 Prices Policy 2 — V

Policy on prices and margins in the food industry. Policy and legislation on food subsidies. Implementation, with the Ministry of Agriculture, Fisheries and Food, of food subsidy schemes.

3-3 Fair Trading — V

Monopolies, mergers and restrictive practices (including EEC competition rules). Consumer advice and protection (other than standards, weights and measures, and consumer credit). Certification trade marks and hallmarking. General liaison with the Office of Fair Trading and the Monopolies and Mergers Commission.

3-4 Consumer Credit Branch — V

Follow-up to Crowther Committee recommendations on consumer credit. Introduction of necessary legislation. Plans for establishment of Consumer Credit Division of Office of Fair Trading. Enforcement of credit control restrictions. Administration of hire purchase legislation.

3-5 Standards, Weights and Measures — AB

Policy on UK and international standards and on quality assurance. British participation in international standards organisations. Government support to the British Standards Institution. Co-ordination of Government policy on metrication and liaison with the Metrication Board.

British Calibration Service — CS

Provides authenticated certification of the accuracy of measuring instruments of all kinds, with traceability of such calibrations to the national standards.

Weights and Measures Services — CS

Provides a technical service to Weights and Measures Authorities and others in discharge of the Department's statutory responsibilities under the Weights and Measures Act 1963.

British Approvals Service for Electrical Equipment in Flammable Atmospheres – Safety in Mines Research Establishment, Harpur Hill, Buxton, Derbyshire (Buxton 6211).

Provides authenticated certification that electrical equipment for use in hazardous locations, other than mines, complies with prescribed standards.

3-6 Information — V

The Department of Prices and Consumer Protection maintains its own Press Office, but other information activities are undertaken as a common service by the Department of Industry (which see).

3-7 Accountancy Services; Economics and Statistics; Establishment; Finance and Economic Appraisal; Parliamentary Branch; Solicitor's Department

All the above Divisions are provided as common services by the Department of Industry (which see).

Key to Address Code – above

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Small Firms Information Centres

The Department of Industry has established a chain of 10 Small Firms Information Centres throughout Great Britain. The centres are designed to offer a free signposting service to small firms and people wishing to establish a business and to assist small firms in finding the right sources of help for their problems.

Correspondence should be addressed 'Small Firms Information Centre'.

Birmingham
53 Stephenson Street, Birmingham B2 4DH (021-643 3344, Telex 337919).

Bristol
Colston Centre, Colston Avenue, Bristol BS1 4UB. (0272 294546, Telex 449650).

Cardiff
16 St. David's House, Wood Street, Cardiff CF1 1ER (0222 396116, Telex 497515).

Glasgow
57 Bothwell Street, Glasgow G2 6TU (041-248 6014, Telex 779334).

Leeds
5 Royal Exchange House, City Square, Leeds LS1 5PQ (0532 445151, Telex 557687).

London
65 Buckingham Palace Road, London SW1W 0QX (01-828 2384, Telex 917920).

Luton
35 Wellington Street, Luton LU1 2SB (0582 29215, Telex 826115).

Manchester
Peter House, Oxford Street, Manchester M1 5AN (061-832 5282, Telex 667952).

Newcastle
22 Newgate Shopping Centre, Newcastle upon Tyne NE1 5RH (0632 25353, Telex 537429).

Nottingham
48-50 Maid Marian Way, Nottingham NG1 6GF (0602 49791, Telex 377313).

EEC Information Unit

1 Victoria Street, London SW1H 0ET (01-222 7877, ext. 4301).

Associated organisations of the three Departments

British Airports Authority – 2 Buckingham Gate, London SW1E 6JL (01-834 6621, Telex 919039).
British Standards Institution – 2 Park Street, London W1A 2BS (01-629 9000).
British Tourist Authority – 64 St. James's Street, London SW1A 1NF (01-629 9191).
Civil Aviation Authority – Aviation House, 129 Kingsway, London WC2B 6NN (01-405 6922).
Design Council – 28 Haymarket, London SW1Y 4SU (01-839 8000).
English Tourist Board – 4 Grosvenor Gardens, London SW1W 0DU (01-730 3400).
Metrication Board – 22 Kingsway, London WC2B 6LE (01-242 6828).
Monopolies and Mergers Commission – New Court, 48 Carey Street, London WC2A 2JT (01-405 9722).
National Computing Centre – Quay House, Quay Street, Manchester M3 3HU (061-832 9731, Telex 668962).
National Research Development Corporation – PO Box 236, Kingsgate House, 66-74 Victoria Street, London SW1E 6SL (01-828 3400).
Performing Right Tribunal – Room 105, 25 Southampton Buildings, Chancery Lane, London WC2A 1AY (01-405 8721, ext. 3353).
Price Commission – Neville House, Page Street, London SW1P 4LS (01-222 8020).
The Office of Fair Trading – Chancery House, 53 Chancery Lane, London WC2A 1SP (01-242 2858).

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Capital expenditure of the manufacturing, distributive and service industries in the second quarter

Manufacturing industry

Capital expenditure by manufacturing industry in the second quarter of 1974 is provisionally estimated to have been £515 million at 1970 prices, seasonally adjusted, about 2 per cent lower than in the first quarter.

Investment in the first half of 1974 was about 5 per cent higher than in the second half of 1973 and more than 11 per cent above the level of the first half. Between the second half of 1973 and the first half of 1974 the increase in expenditure on new building work was 3 per cent, on vehicles 5 per cent and on plant and machinery almost 6 per cent.

Distributive and service industries (excluding shipping)

Provisional estimates indicate that the capital expenditure of the distributive and service industries (excluding shipping) in the second quarter of 1974 was £468 million at 1970 prices, seasonally adjusted, some 5 per cent lower than in the previous quarter.

Investment in the first half of 1974 was 4 per cent below that in the corresponding period of 1973, mainly because of a 7 per cent fall in expenditure on plant and machinery. Between the second half of 1973 and the first half of 1974, capital expenditure fell by 6 per cent in total, with expenditure on new building work little changed while that on vehicles fell by over 8 per cent and on plant and machinery by over 10 per cent.

Fixed capital expenditure at 1970 prices seasonally adjusted

Time Rates of Wages and Hours of Work

A volume of tables giving particulars of the minimum, or standard, time rates of wages for the more important industries and occupations, and of the normal weekly hours for which these rates are payable. The details given relate to the position as at April 1, 1972, but any later changes known to have come into operation are shown.

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Shipping industry

Provisional estimates for the second quarter show that investment by this industry, which often tends to fluctuate, was on this occasion very much the same as in the previous quarter, at 1970 prices, seasonally adjusted. The rate of investment in the first half of 1974 has been appreciably lower than in 1973.

Revisions to the series

The results of annual surveys, with their greater coverage, are used to up-date the quarterly figures which are derived from smaller sample surveys. The figures for manufacturing industry have been revised to take into account final results of the 1970 Annual Census of Production, final results for most industries of the 1971 Census and the provisional results of the 1972 Census. The data for the distributive and service industries have been revised to take account of annual inquiries in respect of 1972.

These revisions have in turn led to revised seasonal adjustments.

TABLE 1 Fixed capital expenditure at 1970 prices seasonally adjusted of manufacturing, distributive and service industries

£ million

Period	Total	Analysis by industrial sectors: Manufacturing industries	Distributive and service industries (excluding shipping)	Shipping industry	Analysis by type of asset: New building work	Vehicles	Plant and machinery
1960	2,582	1,436	955	192	765	517	1,300
1961	2,934	1,706	1,075	153	906	490	1,535
1962	2,778	1,575	1,075	129	909	438	1,432
1963	2,661	1,391	1,164	106	840	466	1,355
1964	3,085	1,569	1,359	158	945	590	1,550
1965	3,236	1,732	1,378	126	988	565	1,684
1966	3,244	1,780	1,343	120	954	556	1,733
1967	3,306	1,735	1,402	169	932	603	1,772
1968	3,688 (3,600)*	1,846 (1,795)*	1,552 (1,545)*	290 (260)*	949	759 (729)*	1,980 (1,925)*
1969	3,858 (3,946)*	1,976 (2,027)*	1,649 (1,656)*	232 (262)*	1,042	724 (754)*	2,092 (2,150)*
1970	4,219	2,130	1,725	364	1,064	850	2,305
1971	4,136	1,996	1,776	365	1,105	825	2,206
1972	4,205	1,802	1,922	482	1,069	998	2,138
1973	4,438	1,920	2,027	491	1,054	1,079	2,305
1969 1st quarter	895 (960)*	448 (483)*	399 (404)*	48 (73)*	253	169 (194)*	474 (514)*
2nd quarter	961 (977)*	496 (505)*	408 (410)*	57 (62)*	259	182 (187)*	519 (530)*
3rd quarter	1,003 (1,010)*	513 (520)*	425	65	272	186	545 (552)*
4th quarter	999	519	418	62	258	188	553
1970 1st quarter	1,007	512	418	78	252	199	556
2nd quarter	1,065	536	436	93	268	217	580
3rd quarter	1,057	537	431	90	265	211	582
4th quarter	1,090	545	440	105	280	223	588
1971 1st quarter	1,020	517	434	68	279	181	559
2nd quarter	1,041	501	440	100	274	218	550
3rd quarter	1,057	499	453	105	277	220	560
4th quarter	1,018	478	448	91	276	206	537
1972 1st quarter	1,038	477	457	104	271	222	544
2nd quarter	1,047	447	481	119	268	245	534
3rd quarter	1,039	438	484	117	262	251	527
4th quarter	1,081	440	500	141	269	280	533
1973 1st quarter	1,133	474	511	149	269	291	573
2nd quarter	1,042	458	492	92	256	230	556
3rd quarter	1,113	486	515	112	274	262	577
4th quarter	1,150	501	510	139	256	296	598
1974 1st quarter	1,102	524	495	83	274	230	598
2nd quarter	1,066	515	468	83	264	228	574

The total of manufacturing industry and of the distributive and service industries covers a wide sector of the economy, accounting – after exclusion of dwellings – for 53 per cent of total expenditure in 1972. The total comprises most industries and services outside agriculture, forestry and fishing, coal mining, public utilities, the public transport corporations and the public administration. The excluded parts are, except for agriculture, very largely in the public sector of the economy. For all industries covered, public expenditure (eg by the British Steel Corporation) is included. However, the figures are largely representative of the trend of expenditure of private industry and business.

* After allowing for expenditure, brought forward into 1968 from 1969 to secure the higher rate of investment grants which ended on 31 December 1968, estimated at £51 million for manufacturing industry, £7 million for distributive and service industry, and £30 million for shipping. The estimate for shipping is particularly uncertain because of the erratic nature of this industry's capital expenditure, while that for the distributive and service industries is uncertain because of the smallness of the effect.

For other footnotes, see end of article.

Monthly Digest of Statistics

Prepared by the Central Statistical Office in collaboration with the Statistics Division of Government Departments, this digest is designed to provide industrialists and business executives with invaluable statistics relating to the economic situation in the United Kingdom. It contains a regular series of detailed statistics on a wide range of subjects which include the following: *Labour, Fuel and Power, External Trade, Wages and Prices, Industrial Production, Industrial Materials, Finance.*

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TABLE 2 Fixed capital expenditure of manufacturing industry at 1970 prices seasonally adjusted

£ million

Period	Total all manufacturing industries	Analysis by industry group: Food drink and tobacco	Coal and petroleum products	Chemicals	Metal manufacture	Engineering shipbuilding and metal goods	Vehicles	Textiles leather and clothing	Paper printing and publishing	Other manufacturing industries	Analysis of type of asset: New building work	Vehicles	Plant and machinery
1960	1,436.0	176.7	40.3	181.6	266.7	292.6	144.4	115.7	90.2	127.8	336.4	81.7	1,017.9
1961	1,705.9	185.5	43.0	221.5	359.1	321.8	193.9	141.6	100.3	139.2	416.2	76.2	1,213.5
1962	1,575.1	188.0	32.1	219.7	315.7	279.3	179.3	121.5	100.8	138.7	387.9	67.3	1,119.9
1963	1,391.4	191.5	41.9	173.6	187.7	280.2	169.5	111.7	100.9	134.4	310.1	81.2	1,000.1
1964	1,568.6	215.2	47.4	215.5	156.7	333.7	162.8	151.5	116.1	169.7	350.2	97.7	1,120.7
1965	1,732.2	216.1	47.7	274.6	151.1	356.3	181.6	173.8	127.5	203.5	390.2	102.2	1,239.8
1966	1,780.1	204.3	78.2	305.4	151.9	363.1	193.8	165.0	111.5	206.9	369.8	98.3	1,312.0
1967	1,735.2	236.0	123.6	255.7	155.3	352.5	194.5	132.9	108.7	176.0	317.1	99.5	1,318.6
1968	1,846.1 (1,795.1)*	246.0	127.4	255.5	145.7	390.8	171.9	176.4	111.8	220.6	330.8	109.2	1,406.1 (1,355.1)*
1969	1,976.1 (2,027.1)*	238.6	102.9	296.3	167.8	393.7	208.4	189.4	121.3	257.7	388.7	115.9	1,471.5 (1,522.5)*
1970	2,129.8	246.4	82.8	382.3	256.4	422.3	233.4	170.9	134.2	201.1	391.2	114.7	1,623.9
1971	1,995.9	248.5	118.6	333.8	295.3	379.1	149.4	144.6	111.2	215.4	357.8	114.3	1,523.8
1972	1,801.7	266.5	101.3	362.5	258.7	358.8	100.2	123.2	102.9	227.6	316.2	119.6	1,365.9
1973	1,919.8	286.0	68.0	216.5	222.9	467.2	124.1	168.9	110.1	256.1	321.4	129.0	1,469.4
1969 1st quarter	448.2 (483.2)*	56.7	28.8	65.3	34.5	92.0	44.0	48.0	24.1	54.8	93.2	26.7	328.3 (363.3)*
2nd quarter	495.6 (504.6)*	61.8	25.4	75.0	40.2	95.3	53.9	47.6	31.4	65.0	96.4	30.7	368.5 (377.5)*
3rd quarter	513.2 (520.2)*	59.4	25.0	80.3	46.4	100.8	54.9	46.7	33.5	66.2	101.3	29.2	382.7 (389.7)*
4th quarter	519.1	60.7	23.7	75.7	46.7	105.6	55.6	47.1	32.3	71.7	97.8	29.3	392.0
1970 1st quarter	511.5	60.9	19.4	91.6	48.5	103.5	56.0	44.3	36.4	50.9	92.7	29.3	389.5
2nd quarter	536.2	66.1	20.9	94.6	59.3	106.2	60.0	44.7	33.7	50.7	99.3	29.2	407.7
3rd quarter	537.1	56.5	24.9	96.4	64.3	107.0	62.0	44.7	32.0	49.3	97.8	29.0	410.3
4th quarter	545.0	62.9	17.6	99.7	84.3	105.6	55.4	37.2	32.1	50.2	101.4	27.2	416.4
1971 1st quarter	517.0	62.4	26.3	88.5	72.6	104.0	40.9	41.7	29.0	51.6	93.2	27.8	396.0
2nd quarter	501.3	61.9	26.0	79.6	71.9	97.8	40.7	38.9	29.4	55.1	89.6	28.8	382.9
3rd quarter	499.3	62.4	32.4	84.3	76.9	91.9	36.6	32.5	27.0	55.3	86.3	28.5	384.5
4th quarter	478.3	61.8	33.9	81.4	73.9	85.4	31.2	31.5	25.8	53.4	88.7	29.2	360.4
1972 1st quarter	476.7	62.3	31.4	75.7	83.6	85.6	27.2	27.5	23.5	59.9	84.1	27.4	365.2
2nd quarter	446.5	65.0	26.7	69.7	64.8	84.6	23.7	30.3	25.6	56.1	79.4	28.5	338.6
3rd quarter	438.2	70.0	22.4	62.1	54.9	91.7	23.1	31.3	26.7	56.0	78.9	30.4	328.9
4th quarter	440.3	69.2	20.8	55.0	55.4	96.9	26.2	34.1	27.1	55.6	73.8	33.3	333.2
1973 1st quarter	473.9	75.9	20.9	56.4	58.8	106.8	29.0	38.6	28.2	59.3	77.6	32.8	363.5
2nd quarter	458.2	64.7	19.8	56.4	46.6	115.5	29.3	36.1	27.1	62.7	73.7	30.1	354.4
3rd quarter	486.4	69.1	15.3	51.8	58.3	119.7	32.2	46.4	27.4	66.2	83.5	32.2	370.7
4th quarter	501.3	76.3	12.0	51.9	59.2	125.2	33.6	47.8	27.4	67.9	86.6	33.9	380.8
1974 1st quarter	524.0	81.8	10.3	59.1	58.3	125.7	34.6	49.3	32.8	72.1	89.5	34.5	400.0
2nd quarter	515.1										86.0	35.0	394.1

TABLE 3 Fixed capital expenditure in the distributive and service industries (excluding shipping) at 1970 prices seasonally adjusted

£ million

Period	Total	Analysis by industry group: Wholesale distribution	Retail distribution	Other industries	Analysis by type of asset: New building work	Vehicles	Plant and machinery
1960	955	127	211	617	428	245	282
1961	1,075	136	235	705	490	261	324
1962	1,075	129	226	720	519	244	312
1963	1,164	141	245	779	528	282	355
1964	1,359	165	276	918	592	337	429
1965	1,378	164	257	957	593	342	444
1966	1,343	148	232	964	580	342	421
1967	1,402	169	224	1,008	611	338	453
1968	1,552 (1,545)*	165	282	1,107 (1,110)*	614	368	570 (563)*
1969	1,649 (1,656)*	160	295	1,195 (1,202)*	649	385	615 (622)*
1970	1,725	176	299	1,250	667	385	673
1971	1,776	185	310	1,281	745	358	673
1972	1,922	201	370	1,351	751	419	752
1973	2,027	209	409	1,410	732	468	827
1969 1st quarter	399 (404)*	39	72	288 (293)*	158	95	145 (150)*
2nd quarter	408 (410)*	40	72	296 (298)*	162	96	150 (152)*
3rd quarter	425	41	73	311	170	94	161
4th quarter	418	40	78	300	159	100	159
1970 1st quarter	418	43	76	299	159	94	166
2nd quarter	436	47	74	315	166	98	171
3rd quarter	431	46	75	310	166	96	169
4th quarter	440	41	74	325	177	96	167
1971 1st quarter	434	44	76	315	185	87	162
2nd quarter	440	46	80	314	184	93	164
3rd quarter	453	47	78	328	190	90	173
4th quarter	448	48	76	325	187	88	174
1972 1st quarter	457	49	83	325	185	98	174
2nd quarter	481	51	89	341	188	103	190
3rd quarter	484	48	95	342	183	107	194
4th quarter	500	54	103	343	195	112	194
1973 1st quarter	511	54	96	361	191	114	206
2nd quarter	492	52	103	337	182	109	201
3rd quarter	515	52	105	357	190	121	204
4th quarter	510	52	104	354	169	125	216
1974 1st quarter	495	49	92	354	184	113	197
2nd quarter	468				178	111	180

TABLE 4 Fixed capital expenditure at current prices of manufacturing, distributive and service industries

£ million

Period		Total	Manufacturing industry	Distributive and service industries (excluding shipping)	Shipping industry
1960		1,912	1,021	728	162
1961		2,213	1,248	833	132
1962		2,148	1,182	859	107
1963		2,094	1,068	942	84
1964		2,477	1,232	1,122	123
1965		2,692	1,423	1,169	100
1966		2,787	1,517	1,172	99
1967		2,862	1,485	1,237	140
1968		3,304	1,639	1,419	247
1969		3,599	1,822	1,560	217
1970		4,219	2,130	1,725	364
1971		4,493	2,191	1,918	384
1972		4,893	2,123	2,218	552
1973		5,753	2,510	2,618	625
1969	1st quarter	792	382	372	38
	2nd quarter	871	438	381	53
	3rd quarter	917	473	386	57
	4th quarter	1,020	530	420	70
1970	1st quarter	938	465	403	71
	2nd quarter	1,034	511	428	95
	3rd quarter	1,043	546	419	77
	4th quarter	1,204	608	475	122
1971	1st quarter	1,038	524	450	65
	2nd quarter	1,093	520	465	108
	3rd quarter	1,132	561	477	94
	4th quarter	1,229	586	525	119
1972	1st quarter	1,150	533	512	105
	2nd quarter	1,179	494	545	140
	3rd quarter	1,173	523	539	111
	4th quarter	1,391	573	622	196
1973	1st quarter	1,387	585	637	165
	2nd quarter	1,295	549	625	121
	3rd quarter	1,401	645	641	115
	4th quarter	1,670	731	715	224
1974	1st quarter	1,524	725	693	106
	2nd quarter	1,535	722	685	128

NOTES TO TABLES

Capital expenditure comprises expenditure on vehicles (including ships) and plant and machinery less receipts from sales of these assets, and on new building work.

The analysis by industry group follows the Standard Industrial Classification Revised 1968 edition:

Manufacturing Orders III to XIX
Distributive Trades Order XXIII
Wholesale MLH 810, 811, 812, 831, 832 (except leasing by finance houses and similar businesses)
Retail MLH 820, 821

Other Industries Order XX (Construction); XXII (Transport and Communication) excluding 701 – Railways, 706 – Port and Inland Water Transport, 707 – Air Transport and 708 – Postal Services and Telecommunications; XXIV (Insurance, Banking, Finance and Business Services) including leasing by Finance Houses and similar Businesses and excluding Trustee Savings Banks; XXV (Professional and Scientific Services) excluding 872 – Educational Services and 874 – Medical and Dental Services; and XXVI (Miscellaneous Services).

The estimates, with the exception of those for manufacturing industry in Table 2, are shown to the nearest £m but should not be regarded as accurate to this degree and care should be taken in using the industry figures in Tables 2 and 3 because of the margins of error involved in the quarterly seasonal adjustments. Also, there may be an apparent discrepancy between the totals and the sum of the constituent parts due to rounding.

Fixed capital expenditure at 1970 prices seasonally adjusted

The first of Marconi Marine's new oil rig communications stations which is to be installed on the offshore platform complex 'TEP' off Abu Dhabi. Main communications are maintained by duplicate systems incorporating the Prospector transmitters (right) with synthesised drive and Nebula receivers (left centre) which, with other ancillary equipment, will provide the facilities required for teleprinter operation using automatic error correction, facsimile transmission and reception and radiotelephone communication with the base stations. Similar equipment will be demonstrated by the company at the Offshore International Exhibition and Conference 1974 to be held at Olympia, London, 7-11 October.

Footwear industry: orders, deliveries and stocks

In the three months ended May 1974 deliveries were estimated to be 8 per cent higher, on a seasonally adjusted pairage basis, than in the three months ended February 1974. Net new orders were at the same level as in the previous three months while at the end of May orders on hand were 8 per cent down on the February 1974 level. The index of production in the three months ended May 1974 was 4 per cent higher than in the three months ended February 1974. The seasonally adjusted figures have been revised and are now based on the seasonal pattern up to the end of 1973.

A detailed breakdown of manufacturers' deliveries by type of footwear in pairage and value terms, together with figures of exports, imports, consumer expenditure, prices and employment are published in the Business Monitor Production Series under the reference PQ 450.

The table below is compiled from the results of the monthly and quarterly inquiries which started at the beginning of 1971 and the KS inquiry which they superseded. Linkage factors spanning the fourth quarter 1970 and the first quarter 1971 have been calculated from matching samples of firms contributing to both the old and new inquiries and the KS results adjusted to provide a single, broadly comparable series. Since the linking factors cover only two quarters however, the amended back data for 1966-70 should be interpreted with caution.

The index of production is calculated from the value of total sales of work done by firms classified to the footwear industry (Minimum List Heading 450 of the standard industrial classification). The movements shown by the index numbers will frequently differ from those shown by the absolute figures of pairage and value which relate to complete footwear only sold by manufacturers classified to MLH 450 and to other industries (eg rubber) in the SIC.

Letters to the Editor

Letters to the Editor should be addressed to the Editor, *Trade and Industry*, Room 437, 1 Victoria Street, London SW1H 0ET, and *not* to HMSO.

Index of production: Orders on hand, net new orders, deliveries and stocks of complete footwear

Monthly averages or monthly totals

	Index of production 1970 = 100	Orders on hand (end period)			Net new orders			Deliveries			Stocks (end period)
		Million pairs		£ million	Million pairs		£ million	Million pairs		£ million	Million pairs
1966		33.6			..			16.4			
1967		37.8			16.5			16.1			
1968	113	41.6			17.3			17.0			
1969	108	34.6			15.9			16.5			
1970	100	38.9			16.6			16.2			
1971	108	32.5		55.7	15.7			16.2		23.8	19.4
1972	104	29.5		59.6	15.2		24.8	15.4		24.5	18.5
1973	108	44.8		84.8	16.8		30.5	15.6		28.4	16.5
	Seasonally adjusted	Actual	Seasonally adjusted	Actual	Actual	Seasonally adjusted	Actual	Actual	Seasonally adjusted	Actual	Actual
1971 1st quarter	104	40.5	36.2	66.0	17.1	15.2	..	16.6	16.5	23.8	17.3
2nd quarter	109	43.3	34.5	67.9	16.6	16.1	26.5	15.7	16.7	22.5	21.1
3rd quarter	111	31.8	36.8	49.0	12.8	16.8	18.3	16.6	16.0	24.6	15.6
4th quarter	109	32.5	34.6	55.7	16.1	14.9	26.6	15.8	15.7	24.4	19.4
1972 1st quarter	106	37.7	37.3	63.4	18.0	15.5	24.7	16.3	15.8	25.5	20.0
2nd quarter	100	35.7	30.3	65.1	13.7	12.9	25.8	14.4	15.2	21.9	24.1
3rd quarter	108	26.4	34.4	49.7	13.1	17.2	20.9	16.2	15.8	26.0	18.2
4th quarter	100	29.5	35.1	59.6	15.8	15.0	27.7	14.8	14.7	24.4	18.5
1973 1st quarter	105	36.2	34.8	62.4	18.1	15.4	29.6	15.9	15.5	28.7	18.7
2nd quarter	107	45.8	41.5	86.5	18.0	18.0	34.0	14.9	15.7	25.9	20.6
3rd quarter	110	40.6	50.2	73.9	13.7	18.1	25.0	15.5	15.2	29.2	16.3
4th quarter	109	44.8	49.9	84.8	17.4	15.7	33.3	16.0	15.8	29.7	16.5
1974 1st quarter p	95	52.1	51.6	87.3	16.3	14.3	29.7	13.9	13.7	28.9	13.6
1972 January	109	33.3	37.8	62.5	15.4	15.4	19.7	14.6	16.1	23.0	
February	103	35.1	37.7	62.4	18.0	15.6	24.9	16.1	15.6	25.0	
March	106	37.7	37.3	63.4	20.7	15.3	29.5	18.1	15.7	28.5	
April	99	40.2	36.3	64.5	16.6	14.5	22.1	14.2	15.6	21.0	
May	100	43.2	36.5	67.7	17.5	15.1	35.8	14.5	14.9	22.7	
June	101	35.7	30.3	65.1	6.9	9.0	19.5	14.4	15.2	22.1	
July	111	30.1	29.0	57.0	9.3	14.7	16.0	14.9	16.0	24.0	
August	106	31.9	36.0	55.5	17.7	23.0	23.3	16.0	16.0	24.8	
September	108	26.4	34.4	49.7	12.2	13.9	23.4	17.6	15.4	29.2	
October	100	25.4	33.7	49.9	16.5	14.1	28.6	17.5	14.8	28.5	
November	100	29.0	34.5	58.7	19.4	15.6	34.9	15.9	14.7	26.1	
December	99	29.5	35.1	59.6	11.4	15.2	19.7	10.9	14.6	18.8	
1973 January	101	33.1	36.7	61.7	18.1	16.2	27.9	14.5	14.6	25.8	
February	108	34.5	36.4	61.4	16.8	15.4	27.8	15.4	15.7	28.1	
March	106	36.2	34.8	62.4	19.5	14.6	32.1	17.8	16.2	32.2	
April	109	41.0	36.4	75.2	19.5	17.1	38.8	14.8	15.5	25.9	
May	106	45.4	37.5	86.7	20.1	17.2	38.6	15.6	16.1	27.0	
June	107	45.8	41.5	86.5	14.5	19.7	24.6	14.1	15.6	24.9	
July	109	42.7	43.8	76.6	11.9	17.7	17.4	15.0	15.4	27.3	
August	112	41.3	46.6	75.2	14.0	18.0	27.9	15.4	15.3	29.3	
September	108	40.6	50.2	73.9	15.4	18.5	29.7	16.1	14.9	31.0	
October	106	44.2	53.3	80.9	22.4	18.4	42.2	18.8	15.3	35.2	
November	111	47.6	53.9	92.1	20.8	16.8	43.1	17.4	16.2	31.9	
December	110	44.8	49.9	84.8	8.9	11.9	14.6	11.8	15.9	21.9	
1974 January p	92	46.3	50.4	84.8	14.0	13.1	25.4	12.5	12.5	25.4	
February p	92	50.6	53.1	86.4	17.3	16.0	28.7	13.0	13.3	27.1	
March p	102	52.1	51.6	87.3	17.5	13.8	35.0	16.1	15.3	34.1	
April p	106	54.1	50.8	91.4	17.2	14.4	35.3	15.1	15.1	31.2	
May p	99	54.7	48.9	100.1	15.0	12.9	38.5	14.3	14.8	29.7	

Manufacturers' and distributors' stocks in the second quarter

Manufacturing industry

Manufacturers' stocks in the second quarter of 1974 are provisionally estimated to have risen by about £100 million at 1970 prices seasonally adjusted. This is in marked contrast to the first quarter which showed a large fall in stocks due to the three day week.

Stocks of materials and fuel and finished goods rose substantially but there was a further decline in work in progress.

The stocks/output index was 94.6. Although lower than that for the first quarter, which was unusually high owing to the sharp fall in output, it was higher than in 1973.

Distributive industries

Wholesalers' stocks are provisionally estimated to have risen by £50 million at 1970 prices, seasonally adjusted, in the second quarter of 1974. The rise was mainly attributable to an increase in stocks held by general wholesale distributors. In the same period, retailers' stocks rose by £17 million at 1970 prices, seasonally adjusted.

Revisions to the series

The results of annual surveys, with their greater coverage, are used to update the quarterly figures, which are derived from smaller sample surveys. The figures for manufacturing industry have been revised to take into account final results of the 1970 Annual Census of Production, final results for most industries of the 1971 Census and provisional results of the 1972 Census. Some revision has also been made to 1969. The figures for wholesaling have been revised to take account of the 1972 annual inquiries. The series for retailing now incorporates results from the 1971 Census of Distribution and the 1972 annual inquiry.

The foregoing revisions have, in their turn, led to revised seasonal adjustments.

Value of physical increase in industry's stocks at 1970 prices seasonally adjusted

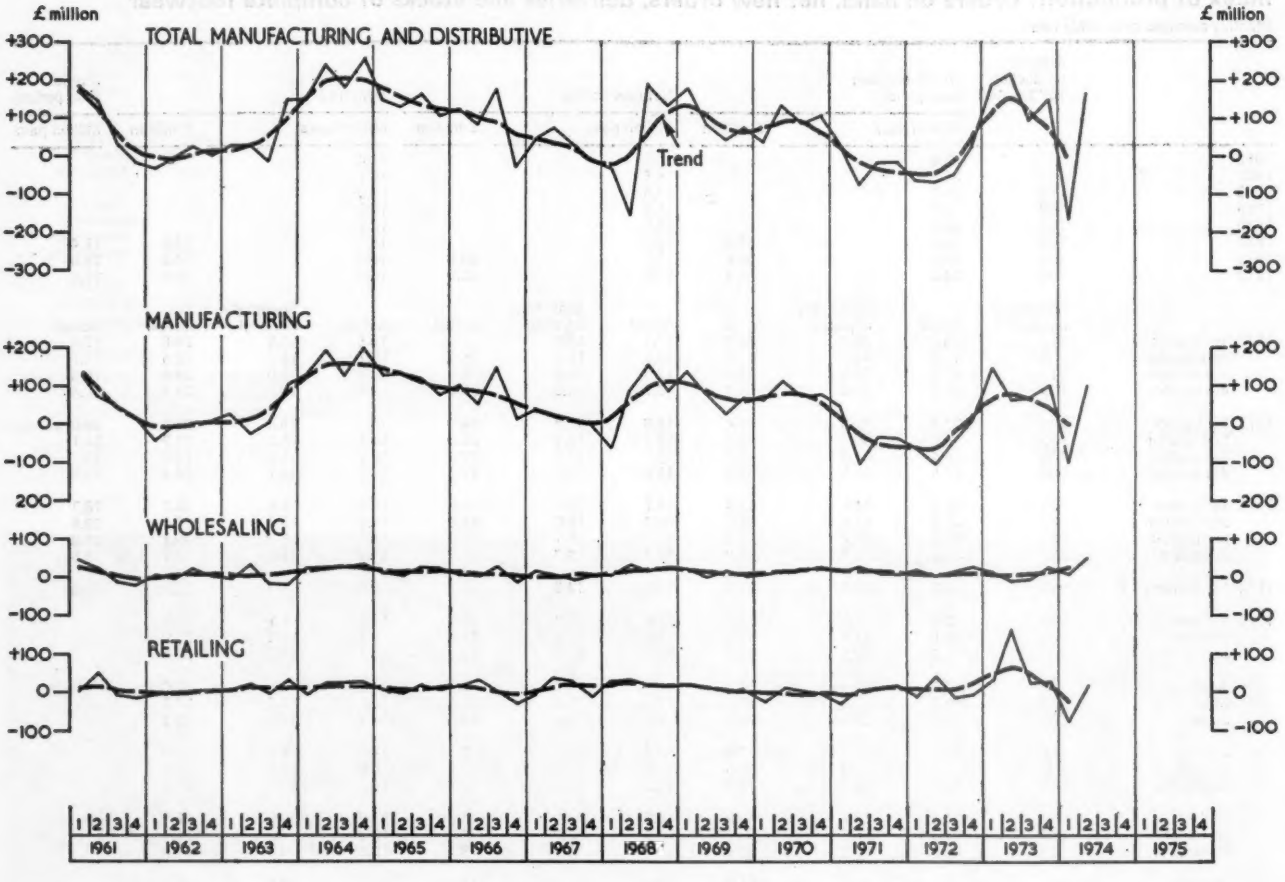

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TABLE 1 Value of physical increase of manufacturers' and distributors' stocks at 1970 prices seasonally adjusted

£ million

	Total	Manu-facturing	Wholesaling	Retailing		Total	Manu-facturing	Wholesaling	Retailing
Level of stocks at end 1973	13,758	10,057	1,767	1,935	Level of stocks at end 1973	13,758	10,057	1,767	1,935
1960	777	654	75	48	1970 1st quarter	39	63	5	−29
1961	341	263	41	37	2nd quarter	136	110	18	7
1962	−3	−40	31	6	3rd quarter	88	72	16	—
1963	192	103	35	54	4th quarter	106	78	29	−1
1964	834	653	118	63					
					1971 1st quarter	31	49	14	−32
1965	556	460	67	29	2nd quarter	−75	−104	26	3
1966	358	315	28	16	3rd quarter	−18	−35	9	8
1967	146	71	17	58	4th quarter	−16	−37	3	17
1968	442	269	85	88					
1969	385	310	42	33	1972 1st quarter	−61	−62	17	−16
					2nd quarter	−67	−106	1	38
1970	369	324	68	−23	3rd quarter	−49	−42	6	−13
1971	−78	−126	52	−4	4th quarter	25	7	24	−6
1972	−153	−205	48	3					
1973	647	374	32	242	1973 1st quarter	189	146	11	32
					2nd quarter	215	61	−9	163
1969 1st quarter	178	138	22	18	3rd quarter	96	68	6	22
2nd quarter	86	77	1	9	4th quarter	148	99	24	25
3rd quatrer	44	27	19	−2					
4th quarter	77	68	1	8	1974 1st quarter	−165	−100	8	−73
					2nd quarter	165	98	50	17

TABLE 2 Value of the physical increase of stocks held by manufacturing industry at 1970 prices seasonally adjusted

£ million

	Analysis by industry group							Analysis by type of asset		
	All manu-facturing industries	Food, drink and tobacco	Chemicals, coal and petroleum products	Metal manu-facture	Engineer-ing, ship-building, vehicles and metal goods	Textiles leather and clothing	Other manu-facturing industries	Materials and fuel	Work in progress	Finished goods
Level of stocks at end 1973	10,057	1,344	969	716	5,049	876	1,104	3,705	3,978	2,374
1960	654	66	46	110	311	37	82	309	134	211
1961	263	23	33	11	141	13	42	69	92	102
1962	−40	38	1	−39	−18	−21	—	−86	2	44
1963	103	12	−8	−8	88	4	16	−13	101	15
1964	653	20	56	46	406	76	50	232	319	103
1965	460	19	33	38	305	3	62	117	207	137
1966	315	1	36	−23	222	31	48	10	145	160
1967	71	34	7	−41	120	−38	−11	−17	140	−52
1968	269	10	72	37	67	34	49	102	108	59
1969	310	33	75	−15	73	76	69	87	26	197
1970	324	11	43	50	222	1	−2	113	122	88
1971	−126	4	17	2	−137	−14	2	−119	−96	88
1972	−205	22	5	−50	−153	−42	14	−38	−8	−159
1973	374	74	81	−52	240	8	23	270	235	−131
1969 1st quarter	138	11	21	3	59	26	18	37	43	58
2nd quarter	77	−3	16	1	32	11	19	46	−15	45
3rd quarter	27	37	2	−13	−44	24	22	−9	2	34
4th quarter	68	−12	35	−6	26	15	11	13	−5	60
1970 1st quarter	63	5	21	−5	26	6	10	21	8	35
2nd quarter	110	6	3	17	86	4	−5	54	57	−1
3rd quarter	72	6	13	15	44	—	−5	32	17	22
4th quarter	78	−6	5	23	67	−9	−1	6	40	32
1971 1st quarter	49	4	−2	38	−2	3	7	−3	−11	63
2nf quarter	−104	−9	13	−30	−48	−28	−2	−44	−67	7
3rd quarter	−35	−11	3	−9	−22	5	−2	−39	—	4
4th quarter	−37	19	4	2	−65	5	−1	−33	−18	14
1972 1st quarter	−62	4	19	−47	−9	−16	−14	−4	13	−71
2nd quarter	−106	14	−25	1	−104	−5	12	−61	5	−51
3rd quarter	−42	−2	14	−5	−32	−13	−5	−6	−5	−32
4th quarter	7	6	−4	—	−9	−8	21	32	−21	−5
1973 1st quarter	146	−4	23	−4	105	−13	38	78	107	−39
2nd quarter	61	9	25	−8	33	10	−8	63	34	−36
3rd quarter	68	33	29	−14	24	1	−4	44	73	−49
4th quarter	99	36	4	−27	79	10	−3	86	21	−8
1974 1st quarter	−100	−3	55	−49	−71	−7	−25	47	−16	−131
2nd quarter	98							63	−43	78

Notes relating to Tables 1 to 4

The analysis by industry group follows the Standard Industrial Classification (1968 edition)
Manufacturing Orders III to XIX
Distributive Trades Order XXIII:

Wholesale MLH 810, 811, 812 831, 832 (except leasing by Finance Houses)
Retail MLH 820, 821

The estimates are shown to the nearest £ million but should not be regarded as accurate to this degree and care should be taken in using the industry figures in Tables 2 and 3 because of the margin of error involved in quarterly seasonal adjustments. Differences between totals and the sum of constituent parts are due to rounding.

TABLE 3 Value of the physical increase of stocks held by wholesalers at 1970 prices seasonally adjusted £ million

	Total wholesalers	General wholesale distributors	Dealers in coal, builders materials, etc.	Dealers in industrial materials and machinery
Level of stocks at end 1973	1,767	1,138	164	465
1960	75	43	6	27
1961	41	27	1	14
1962	31	5	5	21
1963	35	14	7	14
1964	118	62	17	39
1965	67	30	7	31
1966	28	21	—	7
1967	17	9	—	8
1968	85	57	4	25
1969	42	19	−2	26
1970	68	15	—	53
1971	52	41	−3	14
1972	48	41	11	−3
1973	32	88	4	−60
1969 1st quarter	22	14	−1	9
2nd quarter	1	−13	−1	14
3rd quarter	19	14	2	3
4th quarter	1	4	−2	−1
1970 1st quarter	5	−3	1	6
2nd quarter	18	10	−3	11
3rd quarter	16	−4	−2	21
4th quarter	29	11	4	14
1971 1st quarter	14	3	1	11
2nd quarter	26	20	1	5
3rd quarter	9	12	—	−3
4th quarter	3	6	−4	2
1972 1st quarter	17	2	1	14
2nd quarter	1	4	2	−5
3rd quarter	6	22	2	−18
4th quarter	24	13	7	5
1973 1st quarter	11	30	—	−19
2nd quarter	−9	6	6	−22
3rd quarter	6	29	2	−25
4th quarter	24	23	−4	5
1974 1st quarter	8	12	−2	−1
2nd quarter	50			

TABLE 4 Increase in the book value of manufacturers' and distributors' stocks £ million

	Total	Manufacturing	Wholesaling	Retailing
Level of stocks at end 1973	18,411	13,544	2,518	2,349
1960	647	543	60	44
1961	375	274	40	61
1962	85	24	30	31
1963	294	200	44	50
1964	891	670	136	85
1965	694	571	73	50
1966	586	480	51	55
1967	282	180	47	55
1968	875	581	138	156
1969	1,111	889	104	118
1970	1,176	903	162	110
1971	788	489	160	139
1972	907	566	217	124
1973	3,092	2,294	472	326
1969 1st quarter	334	251	16	66
2nd quarter	308	256	18	34
3rd quarter	196	137	65	−6
4th quarter	274	246	4	24
1970 1st quarter	291	255	16	20
2nd quarter	320	259	26	36
3rd quarter	234	140	78	16
4th quarter	331	250	43	38
1971 1st quarter	265	215	29	21
2nd quarter	301	185	60	56
3rd quarter	117	33	70	14
4th quarter	105	57	—	48
1972 1st quarter	78	47	5	27
2nd quarter	188	100	25	63
3rd quarter	239	135	106	−1
4th quarter	402	285	82	35
1973 1st quarter	521	411	41	69
2nd quarter	604	488	58	58
3rd quarter	864	580	209	75
4th quarter	1,103	815	164	124
1974 1st quarter	1,665	1,417	197	50
2nd quarter	1,592	1,212	213	167

Book Values exclude VAT. Purchase Tax payable on retailers' stock prior to the second quarter of 1973.

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TABLE 5 The relationship of manufacturers' stocks to manufacturing production

Index numbers – 4th quarter 1969 = 100
Seasonally adjusted

	Stock levels at 1970 prices	Production (with 1970 net output weight)	Ratio of Stocks to Production
1962 Q 1	77	75	103.9
2	77	76	102.2
3	77	76	101.4
4	77	75	102.9
1963 Q 1	78	74	104.7
2	77	77	100.6
3	77	80	97.3
4	79	82	96.3
1964 Q 1	80	84	94.8
2	82	84	97.1
3	83	85	97.7
4	85	88	97.4
1965 Q 1	87	87	99.2
2	88	88	100.4
3	89	87	102.0
4	90	89	101.3
1966 Q 1	91	90	100.9
2	92	90	101.9
3	93	90	103.1
4	93	87	106.7
1967 Q 1	94	89	105.4
2	94	90	104.6
3	94	90	104.5
4	94	92	102.6
1968 Q 1	93	95	98.2
2	94	96	98.2
3	96	97	99.3
4	97	97	99.6
1969 Q 1	98	98	99.7
2	99	100	98.6
3	99	100	99.4
4	100	100	100.0
1970 Q 1	101	100	100.8
2	102	100	102.2
3	103	101	102.0
4	103	101	102.2
1971 Q 1	104	100	103.7
3	103	101	102.3
3	102	100	102.5
4	102	99	102.9
1972 Q 1	101	99	102.6
2	100	102	98.7
3	100	103	97.2
4	100	106	94.3
1973 Q 1	101	111	91.3
2	102	110	93.0
3	103	111	92.4
4	104	111	93.8
1974 Q 1	103	106	97.3
Q 2	104	110	94.6

(1) The index numbers of the level of stocks relate to the end of each quarter; the index of production refers to production during the quarter.
(2) The 1970 index of production has been rebased on the fourth quarter of 1969 for the purpose of this table.
(3) The index numbers of the stocks production ratio are calculated from unrounded estimates of the data in the previous two columns.

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Industrial expenditure on scientific research and development: provisional results of the 1972 survey

This article presents the provisional summary results of the survey of industry spending on scientific research and development in 1972 covering private industry, public corporations and research associations. These results are subject to revision in the light of further information and it may be possible to publish more detail later. Comparisons are made with the results of the four preceding surveys. The article carries forward by three years the figures for industrial expenditure for 1969 and earlier years published in the 21 December 1972 issue of *Trade and Industry*. Summary figures for all sectors covering 1966 to 1969 and the two previous surveys for 1961 and 1964 were published by the Central Statistical Office in *Research and Development Expenditure*, Studies in Official Statistics No. 21. In a recent article (*Economic Trends* March 1974 and *Trade and Industry* 2 May 1974) statistics of expenditure on research and development have been related to other economic information.

Definitions

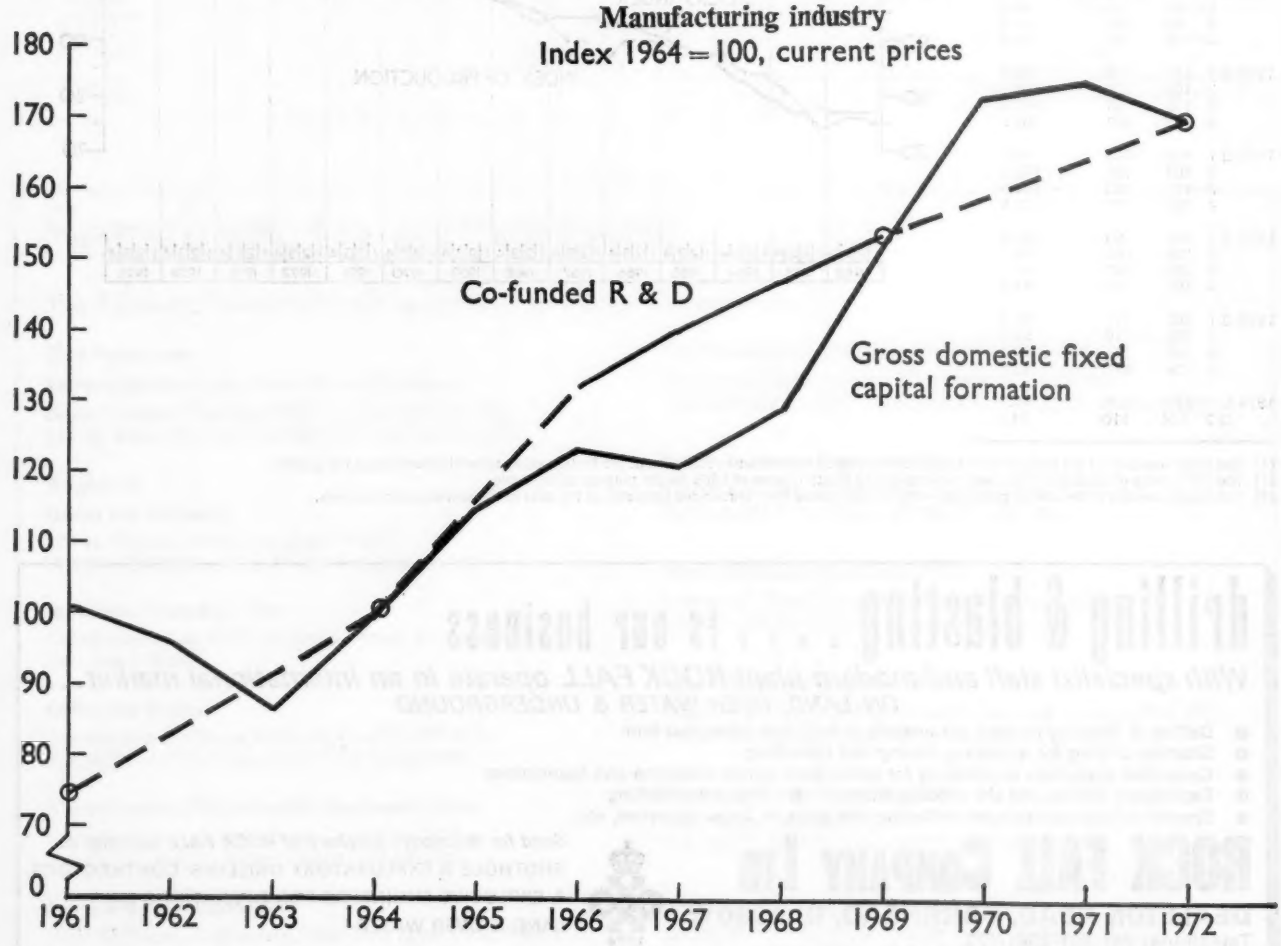
The surveys follow the internationally agreed concepts of the Organisation for Economic Co-operation and Development for the analysis of research and development. Definitions of basic research, applied research and experimental development are given in the notes. The CSO publication already referred to (*R & D Expenditure*, Studies in Official Statistics No. 21) also carries detailed notes on the definition and scope of R & D and the methodology of carrying out the surveys. The figures presented relate to actual amounts of money spent and are thus at current prices. Research in the social science is excluded.

Total expenditure

The total of industrial expenditure on scientific research and development, either carried out within industry's own establishments or financed by industry and carried out elsewhere, was estimated to have amounted to £835 million in 1972. In arriving at the total of expenditure for all industry, only the money spent in industry's own establishments *plus* R & D work put out by industry to other sectors – that is to Government establishments, universities, etc. – is counted; it is assumed that R & D work contracted out within industry is covered by the returns of the contractor.

At £835 million, total expenditure on research and development in 1972 was 17 per cent higher than three years before in 1969. This rate of increase was about the same as in the three preceding years from 1966 to 1969, but in the earlier period the rate of increase in prices was much less than in the later period. In the absence of a specific price index for costs of research and development no comparison of the relevant price changes can be made. However, a general measure of price changes is provided by the index for all home costs per unit of output (the price index for gross domestic product) which increased by just over 10 per cent from 1966 to 1969 compared with an increase of nearly 30 per cent from 1969 to 1972. Research and development expenditure is a labour intensive activity, around half of the expenditure being on wages and salaries. From 1966 to 1969, the index of average earnings for all employees published by the Department of Employment increased by 20 per cent, compared with 40 per cent over the later three years from 1969 to 1972. Although these price changes

Fixed capital formation and research and development expenditure



Sources: National Income and Expenditure 1972 and 1973, Table 54; Research and Development Expenditure and EcS6B.

have limited relevance so far as expenditure on research and development is concerned, they do suggest that, in terms of constant prices, expenditure on research and development was probably appreciably lower in 1972 than in 1969.

For manufacturing industry alone, the increase in total expenditure on research and development from 1969 to 1972 was 15 per cent, slightly less than the increase in the preceding three year period, which was 17 per cent. An indication of the relative importance of these increases is provided by relating the R & D expenditure to the value added by manufacturing industry, as was done in the article already referred to. While from 1966 to 1969 the increase in research and development expenditure in manufacturing kept pace with the growth in the value added by manufacturing industry – this percentage was about 5¼ per cent in both 1966 and 1969 – it declined in relation to value added between 1969 and 1972 and this percentage had dropped to 4¼ per cent by 1972.

While total expenditure on R & D increased by 15 per cent within manufacturing between 1969 and 1972 that part of the expenditure funded by the companies themselves increased by only 10 per cent, compared with 17 per cent over the preceding three years. The chart shows the extension to 1972 of the chart previously published in the earlier articles referred to, showing the changes in company-funded research and development alongside those in fixed capital formation. In current price terms, the increase in company-funded

TABLE 1 Total expenditure on research and development carried out within or financed by industry in United Kingdom 1972/73

£ thousand

	Total expenditure	Research and development carried out within industry				Research and development financed by industry and carried out by other sectors (4)
		Total	Private industry	Public corporations	Research associations	Total
ALL PRODUCT GROUPS	835,207	827,259	739,246	69,165	18,848	7,949
Mining and quarrying (1)	3,383	3,333	1,959	363	1,012	50
Manufactures:						
Total	808,096	802,886	733,426	54,020	15,440	5,210
Food, drink, tobacco	26,631	26,084	24,643	—	1,442	546
Chemical and allied products:						
Total	140,773	137,849	135,170	1,425	1,254	2,926
Petroleum products	13,802	13,585	13,585	—	—	218
Pharmaceutical products	43,195	41,907	41,907	—	—	1,288
Paint	4,089	4,087	3,800	—	287	2
Synthetic rubber, resins and plastic materials	14,815	14,773	14,425	—	348	43
Other chemicals	64,872	63,497	61,453	1,425	619	1,375
Iron and steel	14,250	14,092	2,009	11,355	728	158
Non-ferrous metals	6,722	6,622	5,661	85	876	100
Mechanical engineering:						
Total	54,122	53,805	35,191	16,347	2,267	315
Metal-working machine tools	2,811	2,786	1,587	105	1,093	25
Textile machinery	1,731	1,714	1,388	—	327	16
Mechanical handling and contractors' plant	4,068	4,035	2,521	1,514	—	33
Industrial plant and steelwork	17,021	16,907	4,507	11,935	465	113
Other machinery and equipment	28,491	28,363	25,188	2,793	382	128
Scientific instruments and systems	20,823	20,706	19,933	87	686	117
Electrical engineering:						
Total	219,611	219,151	193,940	23,535	1,676	462
Electronic computers	27,300	27,289	26,979	22	288	11
Electronic components and apparatus including telecommunications	152,089	151,720	133,271	18,294	155	370
Electrical machinery	24,492	24,441	19,642	3,745	1,055	50
Insulated wires and cables	5,526	5,507	4,158	1,256	93	20
Domestic appliances	2,925	2,924	2,664	218	41	2
Miscellaneous electrical goods	7,279	7,270	7,226	—	44	9
Ships and marine engines	7,150	7,101	5,875	114	1,111	49
Motor vehicles	57,265	57,140	56,164	222	754	125
Aerospace (including air cushion vehicles)	208,416	208,337	208,092	223	22	78
Metal goods not elsewhere specified	8,690	8,657	7,905	514	237	34
Textiles and man-made fibres	13,376	13,306	12,220	—	1,086	71
Leather, leather goods and fur	239	239	111	—	128	1
Clothing and footwear	831	830	353	—	477	1
Building materials and abrasives	4,564	4,481	3,941	—	540	84
Pottery, china and glass	7,537	7,490	7,160	—	330	46
Timber and furniture	978	977	386	41	550	1
Paper, paper products and publishing	4,316	4,300	3,802	—	498	17
Rubber and rubber goods	5,885	5,867	5,104	—	763	17
Other manufactures	5,918	5,857	5,769	73	15	61
Construction (2)	3,198	3,069	1,630	295	1,144	129
Utilities and services (3)	20,531	17,971	2,231	14,488	1,253	2,560

(1) Mining and quarrying products, petroleum and natural gas exploration and extraction.
(2) The figures for this product group do not include the sums for the appreciable development work undertaken on sites: particularly work undertaken in civil engineering.
(3) Gas, electricity, water, railway, road, sea and air transport systems, industrial health and safety, etc.
(4) Government establishments, universities, non-profit organisations.

Finance for technology

The National Research Development Corporation provides financial and other support for technological developments of potential commercial importance. NRDC promotes the adoption by industry of new products and processes invented in government laboratories, universities and elsewhere. NRDC is participating in joint ventures with industry on an increasing scale. By supporting projects NRDC makes it possible for individual firms or groups of companies to undertake and accelerate the development and production of new products and processes of national importance. The corporation welcomes submissions in confidence from firms who have promising new projects to launch in any branch of industry or commerce. The conditions for its considering proposals of this kind are set out in a leaflet which may be obtained on application, either by writing to the National Research Development Corporation, PO Box 236, Kingsgate House, 66-74 Victoria Street, London SW1H 0ET; or by telephoning 01-828 3400.

R & D between 1969 and 1972 was similar to the increase in expenditure on fixed capital formation but in constant price terms fixed capital formation was 12 per cent lower in 1972 than in 1969.

The increase of 17 per cent in total research and development expenditure between 1969 and 1972 was not spread evenly over all product groups and the rates of increase for individual groups of products varied appreciably. For all chemicals and allied products the increase was well above the overall average at 30 per cent and in the case of pharmaceuticals the increase was 65 per cent. For aerospace the increase was 22 per cent, and for electrical engineering including electronics it was 17 per cent. In contrast, for mechanical engineering as a whole there was a fall of 11 per cent and expenditure fell for each of the individual product groups distinguished within this total.

The main results of the inquiry are summarised in Table A which gives comparative figures for the four preceding surveys. While there was an increase of 17 per cent in total research and development expenditure between 1969 and 1972 there was an increase of 19 per cent in expenditure carried within industry and the small amount of research and development contracts placed outside industry actually fell. The increase in expenditure from Government funds between 1969 and 1972 was 22 per cent and there was only a 15 per cent increase in funds from all other sources, mainly companies' own funds. Within this figure, the amount of funds from overseas increased by about two-thirds but in 1972 was still only about one-tenth of the funds from non-government sources.

TABLE A Analysis of total expenditure on R & D 1966 to 1972

Private industry, public corporations and industrial research associations

£ million

	1966	1967	1968	1969	1972
R & D expenditure					
Total	611.5	631.4	666.2	711.0	835.2
Carried out within industry	607.3	624.4	657.3	697.4	827.3
Put out by industry to other sectors	4.3	7.0	8.9	13.5	7.9
Funds for industry's R & D:					
Total	611.5	631.4	666.2	711.0	835.2
Government funds	199.8	200.9	208.7	227.7	277.3
Overseas funds	21.2	23.3	29.1	32.6	54.0
Other funds (mainly own funds)	390.5	407.2	428.4	450.6	503.9

Table 1 of the detailed tables presents the total expenditure on scientific research and development in 1972, analysed according to the sector in which the work was carried out and by product group. The breakdown by sector in 1972 was very similar to that in 1969. Most of the work (89 per cent) was carried out within private industry, 8 per cent was carried out in the laboratories of the public corporations, 2 per cent in research associations and only 1 per cent was financed by industry but carried out elsewhere.

Of the £827 million spent in 1972 on work carried out within industry, £61 million, or 7 per cent, was capital expenditure on land, buildings, plant and equipment and 93 per cent was current expenditure (see Table B). In 1969 capital expenditure accounted for 10 per cent of the total. As in 1969, in 1972 capital expenditure was

TABLE 2 Capital expenditure on research and development carried out within private industry, public corporations and research associations in United Kingdom 1972/73

£ thousand

	All industry	Private industry	Public corporations	Research associations
	Total	Total	Total	Total
ALL PRODUCT GROUPS	60,511	47,669	11,505	1,337
Mining and quarrying (1)	214	144	57	13
Manufactures:				
Total	58,574	47,365	10,105	1,103
Food, drink, tobacco	3,824	3,538	—	285
Chemical and allied products:				
Total	18,001	17,845	83	72
Petroleum products	1,397	1,397	—	—
Pharmaceutical products	8,516	8,516	—	—
Paint	143	125	—	18
Synthetic rubber, resins and plastics materials	1,727	1,706	—	20
Other chemicals	6,218	6,101	83	34
Iron and steel	2,453	289	2,138	26
Non-ferrous metals	790	718	14	59
Mechanical engineering:				
Total	4,385	1,466	2,809	111
Metal-working machine tools	143	89	1	53
Textile machinery	48	40	—	8
Mechanical handling and contractor's plant	435	162	273	—
Industrial plant and steelwork	2,571	184	2,357	31
Other machinery and equipment	1,188	991	178	19
Scientific instrumants and systems	1,262	1,223	—	39
Electrical engineering:				
Total	13,988	8,919	4,977	91
Electronic computers	1,202	1,176	16	11
Electronic components and apparatus including telecommunications	9,200	6,022	3,169	9
Electrical machinery	2,110	721	1,324	64
Insulated wires and cables	980	529	446	5
Domestic appliances	154	129	22	2
Miscellaneous electrical goods	342	342	—	—
Ships and marine engines	157	129	1	27
Motor vehicles	4,219	4,132	22	65
Aerospace (including air cushion vehicles)	4,448	4,446	2	—
Metal goods not elsewhere specified	1,253	1,194	41	18
Textiles and man-made fibres	873	849	—	24
Leather, leather goods and fur	11	9	—	2
Clothing and footwear	37	19	—	18
Building materials and abrasives	436	393	—	43
Pottery, china and glass	677	668	—	9
Timber and furniture	84	22	13	49
Paper, paper products and publishing	359	329	—	29
Rubber and rubber goods	485	352	—	133
Other manufactures	833	826	6	—
Construction (2)	204	58	59	87
Utilities and services (3)	1,519	102	1,289	133

(1) Mining and quarrying products, petroleum and natural gas exploration and extraction.

(2) The figures for this product group do not include the sums for the appreciable development work undertaken on sites: particularly work undertaken in civil engineering.

(3) Gas, electricity, water, railway, road, sea and air transport systems, industrial health and safety etc.

TABLE 3 Current expenditure on research and development carried out within private industry, public corporations and research associations in United Kingdom: analysis by type of expenditure 1972/73

£ thousand

	All industry				Private industry				Public corporations				Research associations			
	Total	Salaries and wages	Materials and equipment	Other	Total	Salaries and wages	Materials and equipment	Other	Total	Salaries and wages	Materials and equipment	Other	Total	Salaries and wages	Materials and equipment	Other
ALL PRODUCT GROUPS	766,748	419,602	179,659	167,487	691,577	372,977	167,735	150,865	57,660	35,241	9,833	12,586	17,511	11,384	2,091	4,036
Mining and quarrying (1)	3,120	1,857	545	717	1,816	1,287	294	234	306	221	32	53	998	349	219	430
Manufactures:																
Total	744,312	406,271	175,678	162,363	686,060	369,398	166,889	149,773	43,915	27,271	7,149	9,494	14,337	9,602	1,640	3,095
Food, drink, tobacco	22,261	14,325	4,011	3,925	21,104	13,507	3,882	3,715	—	—	—	—	1,156	817	129	210
Chemical and allied products:																
Total	119,847	77,105	14,133	28,610	117,323	75,277	13,873	28,174	1,341	983	159	200	1,182	843	102	236
Petroleum products	12,188	8,471	1,318	2,399	12,188	8,471	1,318	2,399	—	—	—	—	—	—	—	—
Pharmaceutical products	33,391	18,794	4,095	10,502	33,391	18,794	4,095	10,502	—	—	—	—	—	—	—	—
Paint	3,943	2,825	386	732	3,674	2,641	359	675	—	—	—	—	269	184	27	57
Synthetic rubber, resins, and plastic materials	13,046	8,644	1,678	2,725	12,718	8,431	1,629	2,658	—	—	—	—	328	212	49	67
Other chemicals	57,279	38,371	6,656	12,252	55,352	36,940	6,472	11,940	1,341	983	159	200	585	447	26	112
Iron and steel	11,639	7,105	1,601	2,934	1,720	1,067	279	375	9,216	5,583	1,223	2,410	703	455	99	148
Non-ferrous metals	5,832	3,396	965	1,471	4,943	2,797	838	1,308	71	42	14	15	817	557	113	148
Mechanical engineering:																
Total	49,420	29,238	10,105	10,077	33,725	20,149	6,755	6,822	13,539	7,776	2,970	2,794	2,155	1,313	380	463
Metal-working machine tools	2,643	1,596	535	512	1,498	928	302	269	104	62	15	27	1,040	605	218	217
Textile machinery	1,666	1,081	401	185	1,347	855	367	125	—	—	—	—	319	226	33	60
Mechanical handling and contractors' plant	3,600	2,028	890	682	2,359	1,340	690	329	1,241	688	200	353	—	—	—	—
Industrial plant and steelwork	14,336	8,261	3,183	2,892	4,324	2,599	823	902	9,579	5,421	2,277	1,882	433	241	84	108
Other machinery and equipment	27,175	16,272	5,096	5,806	24,197	14,427	4,573	5,197	2,615	1,605	478	532	363	241	45	78
Scientific instruments and systems	19,444	11,251	3,702	4,491	18,710	10,731	3,612	4,367	87	59	10	18	647	461	81	105
Electrical engineering:																
Total	205,163	114,676	43,616	46,872	185,021	101,419	40,907	42,695	18,559	12,244	2,522	3,793	1,583	1,013	189	383
Electronic computers	26,087	13,279	3,889	8,919	25,804	13,108	3,835	8,861	6	6	—	—	277	165	55	58
Electronic components and apparatus including telecommunications	142,520	79,044	32,716	30,760	127,248	68,653	31,004	27,592	15,126	10,293	1,701	3,132	146	98	11	36
Electrical machinery	22,331	13,212	4,833	4,287	18,920	11,215	4,127	3,578	2,420	1,363	596	461	991	633	110	247
Insulated wires and cables	4,527	2,769	657	1,101	3,629	2,254	451	924	810	456	199	155	87	59	7	22
Domestic appliances	2,770	2,012	384	374	2,535	1,860	355	319	197	126	26	45	39	26	3	10
Miscellaneous electrical goods	6,928	4,360	1,137	1,431	6,885	4,329	1,135	1,421	—	—	—	—	43	31	3	10
Ships and marine engines	6,944	2,892	4,052		5,747	2,145	3,602		113	68	16	29	1,084	679	73	332
Motor vehicles	52,921	35,384	7,464	10,073	52,033	34,864	7,235	9,934	200	76	95	28	689	443	135	111
Aerospace (including air cushion vehicles)	203,889	80,387	79,279	44,224	203,647	80,246	79,229	44,172	221	124	49	48	22	16	2	3
Metal goods not elsewhere specified	7,404	4,751	1,277	1,376	6,711	4,333	1,179	1,199	474	265	76	133	220	153	23	45
Textiles and man-made fibres	12,433	8,121	2,182	2,130	11,371	7,350	2,078	1,943	—	—	—	—	1,062	771	103	188
Leather, leather goods and fur	228	178	23	28	102	86	7	9	—	—	—	—	126	92	16	18
Clothing and footwear	793	564	102	127	334	228	72	34	—	—	—	—	459	336	30	93
Building materials and abrasives	4,045	2,653	656	736	3,548	2,330	626	592	—	—	—	—	497	323	30	144
Pottery, china and glass	6,813	4,459	2,354		6,492	4,221	2,271		—	—	—	—	321	238	27	56
Timber and furniture	893	581	109	203	364	244	74	45	28	16	5	7	501	320	30	151
Paper, paper products and publishing	3,941	2,697	432	812	3,472	2,370	401	701	—	—	—	—	469	326	31	111
Rubber and rubber goods	5,383	3,459	543	1,380	4,753	3,025	497	1,231	—	—	—	—	630	434	46	149
Other manufactures	5,024	3,056	1,004	963	4,943	3,012	991	940	66	35	12	20	15	9	2	4
Construction (2)	2,865	1,683	481	702	1,572	903	329	341	236	144	44	48	1,057	636	108	313
Utilities and services (3)	16,542	9,791	2,955	3,706	2,129	1,389	224	517	13,204	7,605	2,608	2,991	1,119	798	124	198

(1) Mining and quarrying products, petroleum and natural gas exploration and extraction.
(2) The figures for this product group do not include the sums for the appreciable development work undertaken on sites: particularly work undertaken in civil engineering.
(3) Gas, electricity, water, railway, road, sea and air transport systems, industrial health and safety, etc.

relatively more important in the expenditure of public corporations than in the expenditure of private industry and the research associations.

TABLE B Capital and current expenditure on R & D in industry 1972

	Total	Capital	Current
	£ million		
All industry	827.3	60.5	766.7
Private industry	739.2	47.7	691.6
Public corporations	69.2	11.5	57.7
Research associations	18.8	1.3	17.5
	Per cent		
All industry	100	7	93
Private industry	100	6	94
Public corporations	100	17	83
Research associations	100	7	93

Capital expenditure

Table C below shows that in 1972, 73 per cent of capital expenditure consisted of plant and equipment and 27 per cent of land and buildings. Corresponding percentages in 1969 were 70 per cent and 30 per cent, roughly the same. The largest amount of capital expenditure again occurred in the product group chemicals and allied products where it was about £18 million. Capital expenditure in electrical engineering was next largest, at about £14 million, compared with £11 million in 1969. Capital expenditure in aerospace fell from £11 million in 1969 to £4 million in 1972.

TABLE C Analysis of capital expenditure 1972 £ million

	Total	Land and buildings	Plant and equipment
All industry	60.5	16.5	44.0
Private industry	47.7	10.9	36.8
Public corporations	11.5	5.2	6.3
Research associations	1.3	0.5	0.9
of which			
Chemicals and allied products	18.0	6.2	11.8
Mechanical engineering	4.4	1.1	3.3
Electrical engineering (including electronics)	14.0	3.7	10.3
Motor vehicles	4.2	0.9	3.3
Aerospace	4.4	0.6	3.8

Current expenditure

Details of current expenditure, which amounted to £767 million in 1972 are shown in Tables 3 and 4. Current expenditure is analysed in two ways: first, (in Table 3) according to type of expenditure – wages and salaries, materials and equipment, and other expenditure, and second (Table 4) according to the type of work, basic and applied research, and development.

Table D below summarises the data in Table 3. It shows that wages and salaries comprised over half of all current expenditure on R & D – in the public corporations and in the industrial research associations the proportion was nearer to two-thirds. Similar results were obtained in 1969 when the corresponding percentages were 56 per cent for private industry, 64 per cent for public corporations and 65 per cent for research associations.

TABLE D Current expenditure in 1972
Analysis by type of expenditure Per cent

	Total	Salaries and wages	Materials and equipment	Other
All industry	100	55	23	22
Private industry	100	54	24	22
Public corporations	100	61	17	22
Research associations	100	65	12	23
of which:				
Chemicals and allied products	100	64	12	24
Mechanical engineering	100	59	20	20
Electrical engineering:				
Electronics and telecommunications (including computers)	100	55	22	24
Other electrical engineering	100	61	19	20
Motor vehicles	100	67	14	19
Aerospace	100	39	39	22

Industry was also asked to report how much of their current expenditure was attributable to basic research, applied research, and development. These categories are defined in the notes at the end of this article, but it needs to be remembered that interpretation of these terms is sometimes difficult and may well be different in different product groups.

TABLE E Current expenditure in 1972
Analysis by type of work Per cent

	Total	Basic	Applied	Development
All industry	100	3	21	75
Private industry	100	3	18	79
Public corporations	100	3	55	43
Research associations	100	11	61	28

Private industry devoted the greater part of its resources and effort to development – in 1972 it was about four-fifths of the total expenditure. The public corporations have an interest in rather long-term projects for their own use; in consequence less than half their expenditure was on development and about one-half on applied research. The industrial research associations spent over 10 per cent of their resources on basic research compared with private industry which spent about 3 per cent. The latter percentage is similar to that in industry in the United States. There is, however, considerable variation between product groups in the importance of basic research. Details are given in Table 4 and some examples are given in Table F.

Economic Trends

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TABLE 4 Current expenditure on research and development carried out within private industry, public corporations and research associations in United Kingdom: analysis by type of work 1972/73

£ thousand

	All industry				Private industry				Public corporations				Research associations			
	Total	Basic	Applied	Development	Total	Basic	Applied	Development	Total	Basic	Applied	Development	Total	Basic	Applied	Development
ALL PRODUCT GROUPS	766,748	26,179	164,187	576,382	691,577	22,573	122,001	547,003	57,660	1,615	31,501	24,543	17,511	1,991	10,685	4,835
Mining and quarrying (1)	3,120	199	1,631	1,290	1,816	199	832	785	306	—	133	173	998	—	666	333
Manufactures:																
Total	744,312	25,289	154,305	564,718	686,060	22,204	120,175	543,682	43,915	1,363	25,487	17,064	14,337	1,723	8,643	3,972
Food, drink, tobacco	22,261	2,116	9,939	10,206	21,104	1,894	9,162	10,049	—	—	—	—	1,156	222	777	157
Chemical and allied products:																
Total	119,847	65,621		54,222	117,323	63,949		53,373	1,341	—	757	584	1,182	224	693	266
Petroleum products	12,188	1,501	5,700	4,986	12,188	1,501	5,700	4,986	—	—	—	—	—	—	—	—
Pharmaceutical products	33,391	2,458	17,492	13,440	33,391	2,458	17,492	13,440	—	—	—	—	—	—	—	—
Paint	3,943	1,249		2,693	3,674	1,000		2,674	—	—	—	—	269	13	237	19
Synthetic rubber, resins and plastics materials	13,046	660	5,712	6,674	12,718	577	5,589	6,552	—	—	—	—	328	83	123	122
Other chemicals	57,279	4,823	26,026	26,429	55,352	4,696	24,936	25,721	1,341	—	757	584	585	128	333	125
Iron and steel	11,639	738	7,708	3,194	1,720	76	527	1,118	9,216	560	6,844	1,812	703	102	337	264
Non-ferrous metals	5,832	335	2,400	3,097	4,943	243	2,076	2,625	71	—	—	71	817	92	324	402
Mechanical engineering:																
Total	49,420	1,169	15,183	33,067	33,725	359	4,962	28,404	13,539	564	9,027	3,948	2,155	248	1,194	716
Metal-working machine tools	2,643	105	780	1,757	1,498	23	284	1,192	104	—	5	99	1,040	83	491	467
Textile machinery	1,666	14	444	1,208	1,347	14	250	1,084	—	—	—	—	319	1	194	125
Mechanical handling and contractors' plant	3,600	9	702	2,889	2,359	9	210	2,140	1,241	—	492	749	—	—	—	—
Industrial plant and steelwork	14,336	696	8,829	4,811	4,324	39	761	3,523	9,579	564	7,803	1,212	433	93	265	75
Other machinery and equipment	27,175	345	4,428	22,402	24,197	274	3,457	20,465	2,615	—	727	1,888	363	71	244	49
Scientific instruments and systems	19,444	1,116	2,951	15,376	18,710	1,017	2,631	15,062	87	—	—	87	647	99	321	227
Electrical engineering:																
Total	205,163	33,791		171,371	185,021	24,086		160,937	18,560	239	8,439	9,880	1,583	220	810	554
Electronic computers	26,087	11	1,044	25,031	25,804	—	948	24,856	6	—	6	—	277	11	91	175
Electronic components and apparatus including telecommunications	142,520	5,276	19,824	117,420	127,248	5,204	13,806	108,239	15,126	50	5,942	9,133	146	22	77	47
Electrical machinery	22,331	563	4,127	17,642	18,920	249	1,667	17,004	2,421	145	1,917	358	991	168	543	280
Insulated wires and cables	4,527	1,474		3,052	3,629	798		2,832	810	44	574	192	87	13	46	28
Domestic appliances	2,770	53	400	2,317	2,535	47	386	2,108	197	—	—	197	39	6	20	13
Miscellaneous electrical goods	6,928	181	838	5,909	6,885	181	806	5,898	—	—	—	—	43	—	33	11
Ships and marine engines	6,944	2,307		4,637	5,747	1,478		4,269	113	—	6	107	1,084	33	791	261
Motor vehicles	52,921	296	6,024	46,601	52,033	133	5,534	46,366	200	—	1	199	689	163	490	36
Aerospace (including air cushion vehicles)	203,889	2,204	6,830	194,855	203,647	2,204	6,806	194,638	221	—	8	213	22	—	17	5
Metal goods not elsewhere specified	7,404	260	2,251	4,894	6,711	240	1,784	4,687	474	—	353	120	220	19	114	87
Textiles and man-made fibres	12,433	480	5,417	6,536	11,371	363	4,794	6,214	—	—	—	—	1,062	117	623	322
Leather, leather goods and fur	228	3	129	96	102	—	8	94	—	—	—	—	126	3	121	3
Clothing and footwear	793	27	271	495	334	—	30	304	—	—	—	—	459	27	241	191
Building materials and abrasives	4,045	67	1,719	2,260	3,548	40	1,356	2,153	—	—	—	—	497	27	363	107
Pottery, china and glass	6,813	2,153		4,661	6,492	1,883		4,609	—	—	—	—	321	—	270	52
Timber and furniture	893	16	488	390	364	16	58	290	28	—	13	15	501	—	416	85
Paper, paper products and publishing	3,941	202	1,300	2,439	3,472	75	986	2,411	—	—	—	—	469	127	314	28
Rubber and rubber goods	5,383	2,582		2,800	4,753	2,162		2,590	—	—	—	—	630	—	420	210
Other manufactures	5,024	160	1,343	3,521	4,943	160	1,292	3,491	66	—	40	27	15	—	11	4
Construction (2)	2,865	250	1,296	1,319	1,572	118	423	1,031	236	5	149	82	1,057	127	724	206
Utilities and services (3)	16,452	7,398		9,054	2,129	624		1,506	13,204	247	5,732	7,224	1,119	142	653	325

(1) Mining and quarrying products, petroleum and natural gas exploration and extraction.
(2) The figures for this product group do not include the sums for the appreciable development work undertaken on sites: particularly work undertaken in civil engineering.
(3) Gas, electricity, water, railways, road, sea and air transport systems, industrial health and safety, etc.

TABLE F Basic research in industry

Percentage of current expenditure on basic research

	All industry	Private industry	Public corporations	Research associations
All product groups	3	3	3	11
of which:				
Food, drink, tobacco	10	9	—	19
Pharmaceutical products	7	7	—	—
Iron and steel and non-ferrous metals	6	5	6	13
Mechanical engineering	2	1	4	12
Electronics and telecommunications (including computers)	3	3	—	8
Motor vehicles	1	1	—	24
Aerospace	1	—	—	—

Source of funds for R & D

Table 5 analyses the total funds available for industrial R & D by product group. As already seen from the summary in Table A, in 1972 Government funds accounted for one-third of the total. In the analysis of the source of funds for total expenditure by all industry work contracted out within industry is excluded from total expenditure in order to avoid duplication.

Time series from 1966 to 1972

Table 6 presents a comparison of expenditure on research and development, carried out within private industry in the year 1972 with the figures for the four preceding surveys.

Definitions and notes

Scientific research and development. Research and development is defined for the purposes of this inquiry in the following categories:

a Basic or fundamental research. Work undertaken primarily for the advancement of scientific knowledge without a specific practical application in view.

b Applied research. Research undertaken with either a general or a particular application in view.

c Development. The use of the results of basic and applied research directed to the introduction of useful materials, processes, products, devices and systems, or the improvement of existing ones. It should include the prototype or pilot plant stage and all work done on development contracts with Government departments, the Atomic Energy Authority and similar public bodies. Firms in the aerospace industry should include expenditure on development batches.

The guiding line to distinguish research and development activity from non-research activity is the presence or absence of an element of novelty or innovation. If the activity follows an established pattern it should be excluded; if it departs from routine and breaks new ground it should be included.

Industry. Industry is defined here as consisting of three parts, private industry, public corporations and the industrial research associations.

Private industry. The inquiry was carried out by the Business Statistics Office (BSO) and a revised register was used for 1972. Using the Census of Production registers an initial inquiry was made to some 6,000 companies asking if they carried out any research and development. As a result of this inquiry some 2,500 questionnaires were despatched to all companies employing over 100 employees and reporting any expenditure on research and development and to those companies who did not respond to the initial inquiry. The expenditure recorded on actual returns received for 1972 accounts for 94 per cent of the total estimate. The figures for construction do not include the sums for the appreciable development work undertaken on sites, particularly work undertaken in civil engineering.

Public corporations. All public corporations known to engage in scientific research and development were surveyed. The list of public corporations is that for the national accounts. Following national accounts practice, the Post Office is regarded as a public corporation and the Atomic Energy Authority is included with Government. In 1967 the British Iron and Steel Research Association was transferred

TABLE 5 Source of finance for research and development carried out within or financed by industry in United Kingdom 1972/73

£ thousand

	All sources of finance	Industry		Government
		Private industry (1)	Public corporation	
ALL PRODUCT GROUPS	835,207	480,176	77,755	277,276
Manufactures:				
Total	808,098	473,822	62,094	272,180
Food, drink, tobacco	26,631	26,214	97	320
Chemical and allied products:				
Total	140,773	137,640	1,933	1,200
Pharmaceutical products	43,195	43,112	56	27
Paint	4,089	4,018	6	65
Synthetic rubber, resins and plastics materials	14,815	14,658	36	121
Other chemicals (2)	78,674	75,852	1,835	987
Iron and steel	14,250	2,390	11,634	226
Non-ferrous metals	6,722	6,354	100	268
Mechanical engineering:				
Total	54,122	32,767	18,017	3,338
Metal-working machine tools	2,811	1,854	526	431
Textile machinery	1,731	1,563	94	74
Mechanical handling and contractors' plant	4,068	2,243	1,824	1
Industrial plant and steelwork	17,021	3,831	12,933	257
Other machinery and equipment	28,491	23,276	2,640	2,575
Scientific instruments and systems	20,823	15,273	161	5,389
Electrical engineering:				
Total	219,611	111,207	28,240	80,164
Electronics and telecommunications (including computers)	179,389	84,154	21,229	74,006
Electrical machinery	24,492	14,349	5,457	4,686
Insulated wires and cables	5,526	4,140	1,327	59
Domestic appliances	2,925	2,691	220	14
Miscellaneous electrical goods	7,279	5,873	7	1,399
Ships and marine engines	7,150	3,221	621	3,308
Motor vehicles	57,265	56,708	247	310
Aerospace (including air cushion vehicles)	208,416	32,106	227	176,083
Metal goods not elsewhere specified	8,690	8,074	523	93
Textiles and man-made fibres	13,376	13,078	—	298
Leather, leather goods and fur	239	191	—	48
Clothing and footwear	831	746	—	85
Building materials and abrasives	4,564	4,479	9	76
Pottery, china and glass	7,537	7,387	—	150
Timber and furniture	978	751	41	186
Paper, paper products and publishing	4,316	4,037	168	111
Other manufactures (3)	11,803	11,194	79	530
Non-manufacturing (4)	27,112	6,354	15,662	5,096

(1) The total of intra-mural work assuming all sub-contracted work represents a double count.
(2) Including petroleum products.
(3) Including rubber and rubber products.
(4) Including mining and quarrying, construction and utilities and services (see full notes to Tables 1-4).

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TABLE 6 Total expenditure on research and development carried out within private industry in the United Kingdom 1966/67, 1967/68, 1968/69, 1969/70, 1972/73

£ million

	Total expenditure					Current expenditure					Capital expenditure				
	1966/1967	1967/1968	1968/1969	1969/1970	1972/1973	1966/1967	1967/1968	1968/1969	1969/1970	1972/1973	1966/1967	1967/1968	1968/1969	1969/1970	1970/1973
ALL PRODUCT GROUPS	562.2	569.8	601.9	636.1	739.2	507.6	507.4	546.4	575.3	691.6	54.6	62.5	55.5	60.8	47.7
Mining and quarrying (1)	1.1	1.3	1.0	0.8	2.0	0.8	0.7	0.9	0.8	1.8	0.3	0.6	0.1	0.1	0.1
Manufactures:															
Total	556.2	563.3	596.6	631.2	733.4	502.3	501.8	541.5	570.7	686.1	53.9	61.5	55.1	60.6	47.4
Food, drink, tobacco	15.8	18.1	18.8	20.7	24.6	13.0	14.7	15.5	17.5	21.1	2.8	3.4	3.3	3.3	3.5
Chemical and allied products: Total	80.2	82.2	90.8	101.9	135.2	67.0	70.1	76.4	84.5	117.3	13.2	12.1	14.6	17.4	17.8
Petroleum products	10.3	10.9	11.9	11.5	13.6	9.2	9.8	10.6	10.2	12.2	1.1	1.0	1.3	1.3	1.4
Pharmaceutical products	17.0	16.4	18.9	24.2	41.9	14.7	14.2	15.5	18.6	33.4	2.3	2.2	3.5	5.6	8.5
Paint	3.3	3.8	3.4	2.7	3.8	3.1	2.8	3.3	2.5	3.7	0.1	1.0	0.1	0.1	0.1
Synthetic rubber, resins and plastic materials	12.5	12.9	13.0	13.9	14.4	9.4	9.1	9.9	11.4	12.7	3.1	3.9	3.2	2.5	1.7
Other chemicals	37.1	38.2	43.6	49.6	61.5	30.6	34.2	37.1	41.7	55.4	6.6	4.0	6.5	7.9	6.1
Iron and steel	11.5	3.0	3.1	2.6	2.0	9.1	2.8	2.7	2.3	1.7	2.4	0.2	0.4	0.3	0.3
Non-ferrous metals	5.4	6.0	5.9	6.8	5.7	4.9	5.1	5.1	6.2	4.9	0.5	0.9	0.8	0.6	0.7
Mechanical engineering:															
Total	49.1	51.3	52.4	45.2	35.2	45.9	47.9	48.8	42.3	33.7	3.2	3.4	3.6	3.0	1.5
Metal-working machine tools	5.4	5.4	5.2	4.2	1.6	5.1	4.9	4.5	3.5	1.5	0.3	0.5	0.8	0.7	0.1
Textile machinery	1.8	1.9	2.3	2.1	1.4	1.7	1.8	2.3	1.9	1.3	0.1	—	—	0.2	—
Mechanical handling and contractors plant	2.8	3.6	3.4	4.0	2.5	2.6	3.5	3.2	3.8	2.4	0.2	0.1	0.1	0.1	0.2
Industrial plant and steelwork	8.5	9.0	8.9	7.6	4.5	7.9	7.8	8.1	7.2	4.3	0.6	1.2	0.8	0.4	0.2
Other machinery and equipment	30.6	31.4	32.5	27.4	25.2	28.6	29.9	30.8	25.8	24.3	1.9	1.6	1.8	1.6	1.1
Scientific instruments and systems	13.9	12.7	14.8	16.2	19.9	13.0	11.9	14.0	15.1	18.7	1.0	0.8	0.8	1.1	1.2
Electrical engineering:															
Total	135.0	136.0	152.6	164.5	193.9	128.1	128.6	144.3	155.3	185.0	6.9	7.4	8.3	9.2	8.9
Electronic computers	105.3	105.6	120.7	22.9	27.0	100.1	100.6	114.5	22.2	25.8	5.2	5.0	6.2	0.7	1.2
Electronic components and apparatus including telecommunications				107.4	133.3				102.0	127.2				5.4	6.0
Electrical machinery	16.0	16.2	16.8	20.4	19.6	15.0	14.5	15.6	18.2	18.9	1.0	1.7	1.2	2.2	0.7
Insulated wires and cables	2.0	3.8	3.3	3.5	4.2	1.7	3.5	3.0	3.3	3.6	0.3	0.3	0.3	0.2	0.5
Domestic appliances	2.7	2.4	2.6	2.8	2.7	2.7	2.3	2.5	2.7	2.5	0.1	0.1	0.1	0.1	0.1
Miscellaneous electrical goods	8.9	8.0	9.3	7.5	7.2	8.6	7.7	8.7	7.0	6.9	0.3	0.3	0.6	0.5	0.3
Ships and marine engines	2.1	1.8	2.2	3.8	5.9	1.7	1.5	1.9	3.8	5.7	0.4	0.3	0.3	—	0.1
Motor vehicles	44.5	44.0	43.7	48.2	56.2	35.2	33.0	38.5	39.7	52.0	9.3	11.0	5.2	8.5	4.1
Aerospace (including air cushion vehicles)	153.0	163.1	164.7	169.4	208.1	144.9	146.6	152.1	158.6	203.6	8.1	16.5	12.6	10.9	4.4
Metal goods not elsewhere specified	8.7	6.6	7.3	10.9	7.9	7.8	6.1	6.6	9.6	6.7	0.9	0.5	0.7	1.3	1.2
Textiles and man-made fibres	11.7	10.8	11.7	14.5	12.2	9.8	9.6	10.8	12.8	11.4	1.9	1.2	0.9	1.7	0.8
Leather, leather goods and fur	0.2	0.3	0.2	0.2	0.1	0.2	0.2	0.2	0.2	0.1	—	0.1	—	—	—
Clothing and footwear	1.0	0.7	0.7	0.7	0.4	0.9	0.7	0.7	0.7	0.3	—	—	—	—	—
Building materials and abrasives	4.3	3.5	4.4	4.2	3.9	3.2	2.9	3.6	3.4	3.5	1.1	0.6	0.8	0.7	0.4
Pottery, china and glass	4.8	5.8	6.6	6.8	7.2	4.2	4.8	5.5	5.8	6.5	0.6	1.0	1.1	1.0	0.7
Timber and furniture	0.8	0.7	0.3	0.5	0.4	0.7	0.6	0.3	0.4	0.4	—	—	—	—	—
Paper, paper products and publishing	5.7	7.4	7.2	4.9	3.8	5.0	6.9	6.6	4.3	3.5	0.7	0.5	0.6	0.6	0.3
Rubber and rubber goods	5.0	5.2	5.8	4.3	5.1	4.5	4.4	5.0	3.8	4.8	0.5	0.8	0.8	0.4	0.4
Other manufactures	3.5	4.0	3.1	4.9	5.8	3.0	3.4	2.9	4.4	4.9	0.5	0.6	0.2	0.5	0.8
Construction (2)	3.3	4.0	3.1	2.4	1.6	2.9	3.6	3.0	2.3	1.6	0.4	0.4	0.2	0.1	0.1
Utilities and services (3)	1.6	1.3	1.2	1.6	2.2	1.6	1.3	1.1	1.6	2.1	—	—	0.1	—	0.1

(1) Mining and quarrying products, petroleum and natural gas exploration and extraction.
(2) The figures for this product group do not include the sums for the appreciable development work undertaken on sites: particularly work undertaken in civil engineering.
(3) Gas, electricity, water, railway, road, sea and air transport systems, industrial health and safety, etc.

from the industrial research associations to public corporations; this happened when it became the Inter-Group Laboratories of the British Steel Corporation. The 1967/68 figures for iron and steel (Table 6) reflects this change and the associated nationalisation of the steel industry.

Under the Civil Aviation Act 1971, a new public corporation was created, the Civil Aviation Authority, and certain aviation matters previously dealt with by the Government were transferred to the CAA; figures for 1972/73 reflect this change.

Industrial research associations. Information on scientific research and development by the research associations which are grant-aided was obtained through the administrative branch of the appropriate Government department with whom they have close links, eg Industry, Environment, etc. The other research associations receive the standard questionnaire.

Product groups. Products commonly associated in production and usually similar in nature or manner of production. It should be noted that product groups generally correspond quite closely to industry groups, since establishments in manufacturing industry are basically defined in terms of their principal products. See Notes to the Report on the Census of Production.

Time period to which surveys relate. Private industry was asked to make returns for either the calendar year 1972 or for a business year ending between 6 April 1972 and 5 April 1973. In the text references to the year 1972 cover both figures for the calendar year and other years ending in 1972/73.

Rounding of figures. Where figures have been rounded there may be discrepancies between the sum of constituent items and the totals as shown.

The following symbol has been used throughout the tables:

— = nil or negligible.

Rebased index numbers of engineering sales and orders (1970=100)

(Recent trends for combined SIC Orders, VII, VIII and IX up to April 1974)

The latest trend estimates and seasonally adjusted volume index numbers of engineering sales and orders are published here for the first time on a 1970 base. These series replace the former 1963 based index numbers previously published in *Trade and Industry*. A full set of tables of the new series, which have been computed for the period from January 1969 to April 1974, will be available in the April edition of Business Monitor PM 33-36.

A short comment on the rebasing of these index numbers is given below and a fuller account of this work and the results will be published shortly in a future issue of Business Mo. 'or PM 33-36, with a summary in this journal.

The latest statistics up to April for engineering home sales and orders in the accompanying table continued to be affected by the aftermath of the three day week early this year. Export sales and orders have continued to expand but the provisional volume estimates of sales and net new orders for the home market in April were slightly lower than in the first quarter. There had been some run-down in stocks of finished goods and a tendency to concentrate effort on the completion of work in progress during the period of restricted working, in order to maintain the volume of sales. Some reversal in this tendency was not unexpected in later months as home and export production schedules reverted to more usual working patterns, with probably some productive activity in rebuilding of stocks, which is not reflected in sales.

The trend estimates in the upper part of the table show that the volume of engineering export sales continued to rise between January

Index numbers for the combined engineering industries (SIC Orders vii, viii and ix) (a)

Volume index numbers: Orders-on-hand, December 1970 unadjusted = 100 Net new orders and sales, 1970 average monthly sales = 100

	Total			Home			Export		
	Orders-on-hand (end of period)	Net new orders	Sales	Orders-on-hand (end of period)	Net new orders	Sales	Orders-on-hand (end of period)	New net orders	Sales
Trend Estimates									
1973 January	101	122	108	106	126	112	92	112	99
February	104	126	110	108	130	114	94	116	99
March	106	129	111	111	133	116	96	118	100
April	109	131	112	114	136	117	99	120	101
May	112	133	113	117	137	117	101	124	102
June	115	135	113	120	138	118	105	128	102
July	118	138	114	122	139	118	108	133	103
August	121	140	114	125	141	119	112	139	103
September	125	142	114	128	141	119	117	143	103
October	128	141	113	131	139	118	122	146	103
November	132	139	112	134	135	116	128	148	103
December	135	135	111	136	130	115	133	147	104
1974 January	137	130	111	137	124	113	138	146	105
February	139	126	111	138	118	112	142	145	107
March	141	122	111	139	114	111	146	144	109
April	142	120	111	139	111	111	149	144	111
Percentage change (b)									
Jan.-April 1974	3.5	−7.5	—	1.5	−10.5	−2.0	8.0	−1.5	6.0
Seasonally adjusted									
1969	101	100	97	102	99	99	100	102	91
1970	100	99	100	100	99	100	100	100	100
1971	93	97	101	95	98	101	89	93	102
1972	99	103	101	103	108	105	90	91	92
1973	136	136	113	137	137	117	133	132	102
1973 1st quarter	106	129	113	111	134	118	97	116	101
2nd quarter	114	131	111	119	134	115	105	124	101
3rd quarter	125	142	114	129	143	118	117	139	104
4th quarter	136	140	114	137	137	118	133	149	104
1974 1st quarter	140	120	110	137	112	112	146	140	105
1973 January	101	128	110	106	133	114	92	116	100
February	104	129	112	109	133	117	94	118	100
March	106	130	116	111	136	122	97	115	102
April	109	131	108	114	135	111	99	120	98
May	111	126	112	117	131	116	100	112	102
June	114	137	114	119	136	118	105	139	102
July	118	144	115	123	150	120	108	132	105
August	121	135	114	125	133	117	112	139	104
September	125	146	113	129	147	117	117	145	102
October	127	131	114	130	130	119	121	134	102
November	131	148	117	133	143	122	128	159	105
December	136	142	111	137	137	113	133	155	105
1974 January	139	128	105	139	122	107	139	143	99
February	140	119	112	139	111	113	142	138	109
March	140	114	112	137	103	115	146	140	106
April	142	130	112	139	122	110	150	151	117
Nov. 1973-Jan. 1974 (av).	139	139	111	139	134	114	139	152	103
Feb.-April 1974 (av.)	142	121	112	139	112	113	150	143	111
Percentage change (b)	2.5	−13.0	1.5	—	−16.5	−1.0	8.0	−6.0	7.5

(a) All figures are provisional.
(b) For orders on hand, the percentage changes compare the level at the end of the latest period shown with the corresponding level for the earlier period.
(c) The percentage changes have been based on the unrounded values and are given to the nearest half percentage point.

and April, with a further 6 per cent increase, after moderate growth during 1973. The index of export net new orders levelled out during this period but the trend was very much higher than that of recent sales, with the result that the index of export orders on hand continued to increase, by 8 per cent.

The trend in home sales shows a fall of 2 per cent between January and April and home net new orders were markedly lower by 10½ per cent. The sharp fall in home net new orders since the third quarter of last year appears to reflect the greater uncertainty and less buoyant investment outlook following the oil crisis and the three day week. Nevertheless new home orders have continued to flow in a little faster than the recent low levels of sales, and home orders on hand have risen a little. For the whole engineering sector the trend of total (home plus export) sales has been steady during the latest three months, as the slight fall in home sales has offset the growth in exports. Total net new orders declined by 7½ per cent in consequence of the decrease in the home market but total orders on hand rose slightly by about 3 per cent.

The figures published in the table are based on the Monthly Engineering Inquiry relating to April 1974. The response rate of 74 per cent to the inquiry for April is judged sufficient to justify publication of provisional indices for this month. Taking into account late returns now received for January, February and March, response rates for these months were 95, 92 and 91 per cent respectively.

Conversion to 1970 Base Year

The updating of the numerical base of the engineering volume index numbers from (1963 = 100) to (1970 = 100) and the accompanying reweighting of all the component industry series to reflect the patterns of sales and orders in 1970, form part of an agreed programme now largely completed, for rebasing the main United Kingdom economic indicators on 1970. The new series of engineering sales and orders will be more consistent with other relevant economic indicators and, in particular, the index numbers of sales now reflects more closely the slower growth shown by the index of production for this sector. The movements in the two indices do not agree exactly however owing to the fact that even with both series on the 1970 base, the engineering sales and production index numbers are constructed with different weighting patterns, based on the values of total sales in 1970 for each industry for the former series and on the values of 1970 net outputs of these engineering industries for the latter. In consequence of the rebasing the recent trend in net new orders is now less buoyant than was indicated by the 1963 based series.

Note

Business Monitor PM 33-36, Engineering (volume indices of sales and orders) is obtainable from HMSO, Box 569, London SE1 9NH, post free for a subscription of £1 per annum. Volume indices are given for sales, orders on hand and net new orders for total, home and export markets, for each of the three SIC Orders VII, VIII and IX (mechanical, instrument and electrical engineering respectively).

'Economic Progress Report' for September

The September issue of *Economic Progress Report* contains the following articles.

Monthly economic assessment

The Treasury's latest report on the economic situation was prepared on the basis of data available up to late-August 1974. This month it includes charts showing the relationship between changes in the level of employment and the numbers registered as unemployed: these show that changes in the employment level in recent years have not been exactly reflected in changes in the numbers registered as unemployed.

Wealth and capital transfer taxes

This article sets out the Government's proposals for achieving the redistribution of wealth in Britain, as described in the White Paper on capital transfer tax and the Green Paper on wealth tax both of which were published on 8 August.

Saving

Two short notes describe the Government's proposals for the introduction of limited 'index-linked' savings schemes and for the future development of the Trustee Savings Banks.

Britain's external balance sheet

Britain's total external assets at the end of 1973 exceeded its external liabilities by about £5,500 million. This article looks at the different types of assets and liabilities.

Sterling effective exchange rate

This is the second in a series of notes explaining the various statistical indicators available for measuring trends in the economy. The index figure of the effective exchange rate of sterling measures the percentage change in the value of sterling since the Smithsonian Agreement of December 1971, taking into account the movement of sterling against the major currencies.

Economic indicators

A full page of charts illustrating some main indicators of the course of the economy 1972-74 will be found on page 8, and a table containing the most recent figures is included on page 7.

The work of BSI

The British Standards Institution is the official standards organisation for this country and is very active in removing technical barriers to trade through international standards organisation such as ISO and IEC. BSI has several other functions. It runs certification and approvals schemes, among them granting licences to manufacturers to use the 'Kitemark'e on products conforming to British Standards. It also undertakes testing work for outside bodies and, through the Technical Help to Exporters Scheme, provides information on technical requirements and approvals procedures in overseas markets. BSI, 2 Park Street, London W1A 2BS.

Sales in the carpet industry in June

The daily rate of manufacturers' sales by value in June was provisionally estimated to have been 16 per cent more than in June 1973, assuming 20 working days in June 1974 and 21 working days in June 1973. In the three months ended June 1974, the daily rate of manufacturers' sales was provisionally estimated to have been 9 per cent more than in the corresponding period of 12 months ago, assuming 62 working days in both periods. The index numbers, which are of manufacturers' sales by value, have been adjusted for the length of the working month, but not for non-statutory holidays or other seasonal factors. The Wholesale Price Index of carpets is shown as a guide to the movement in prices.

1970 = 100

		Index of manufacturers' sales	Wholesale price index
1969		93	96.6
1970		100	100.0
1971		115	104.9
1972		135	111.7
1973		166	130.2
1973	Quarter ended June	171	127.7
	Quarter ended September	149	132.7
	Quarter ended December	183	135.1
1974	Quarter ended March	165	141.5
	Quarter ended June	186	150.6*
1973	March	179	125.5
	April	177	125.5
	May	168	126.5
	June	168	131.0
1974	March	192	143.4
	April	183	148.4
	May	181	151.6
	June	194	151.9*

* Provisional.

Deliveries of man-made fibres in the second quarter of 1974

Total deliveries of man-made fibres in the second quarter of 1974 were 7 per cent less than in the second quarter of 1973. Deliveries of continuous filament yarns to the home trade were 14 per cent less than in the second quarter of 1973, while deliveries of staple fibre were 4 per cent less.

Deliveries of continuous filament yarns (*a*)

Thousand metric tons

	Total	Home						Exports as yarn (*b*)
		Total	Broad weaving	Carpets and rugs	Weft knitting	Warp knitting	Industrial purposes (tyres etc.)	Other purposes	
1968	238.4	188.9	35.3	4.7	54.9	32.0	52.2	9.8	49.4
1969	242.7	193.6	33.7	5.5	51.9	35.3	58.8	8.4	49.1
1970	254.8	198.1	28.2	7.1	63.7	38.0	53.3	7.8	56.7
1971	261.4	198.7	25.3	8.7	69.9	41.4	43.5	9.9	62.7

	Total	Home						Textured or texturing for all purposes other than carpets or industrial	Exports as yarn (*b*)
		Total	Broad weaving	Carpets and rugs	Warp knitting	Industrial purposes (tyres, etc.)	Other purposes		
1972	270.1	198.7	25.1	13.4	40.4	40.8	10.0	69.0	71.4
1973	313.6	227.5	25.8	19.4	46.6	45.4	13.0	77.4	86.1
1973 1st quarter	82.4	59.0	6.8	4.5	12.3	11.7	3.0	20.7	23.4
2nd quarter	81.8	60.2	6.5	5.3	12.2	12.6	3.4	20.2	21.7
3rd quarter	71.1	50.2	5.7	4.4	10.5	9.9	2.9	16.8	20.8
4th quarter	78.3	58.1	6.9	5.3	11.6	11.1	3.6	19.6	20.2
1974 1st quarter	72.7	50.9	4.8	4.0	10.8	9.0	3.1	19.2	21.7
2nd quarter	71.9	51.8	6.2	4.4	9.9	9.6	3.2	18.5	20.1

(*a*) The classification of end uses was revised in January 1968 and the figures for deliveries to individual industries 1968 to 1971 might not be fully comparable with those for earlier years. From January 1972 a further reclassification was introduced: deliveries of textured yarns and yarns for texturing, which were previously included in the figures for individual industries, are shown separately from the first quarter 1972.
(*b*) The figures refer to deliveries from the industry direct for export and may differ from the totals recorded as exports in the monthly trade accounts.

Deliveries of staple fibre (*a*)

Thousand metric tons

	Total	Home					Exports (*b*)
		Total	Cotton spinning	Wool spinning	Flax spinning	Other systems and sundries	
1968	282.4	173.1	52.3	58.2	26.3	36.3	109.3
1969	299.3	169.2	51.1	51.5	28.0	38.6	130.1
1970	329.4	191.4	57.6	57.1	31.5	45.2	138.1
1971	338.7	185.9	59.6	50.1	29.3	46.9	152.9

	Total	Home				Exports (*b*)
		Total	Cotton spinning	Wool spinning	Other systems and sundries	
1972	363.9	186.4	49.5	33.4	103.5	177.5
1973	434.8	235.4	62.8	56.0	116.7	199.4
1973 1st qtr.	106.6	56.7	14.9	12.0	29.8	50.0
2nd qtr.	108.1	62.2	16.5	14.9	30.9	45.9
3rd qtr.	103.9	53.4	14.3	12.7	26.5	50.5
4th qtr.	116.2	63.1	17.1	16.4	29.6	53.1
1974 1st qtr.	103.8	48.3	12.6	13.0	22.6	55.5
2nd qtr.	103.2	59.7	16.5	14.9	28.3	43.5

(*a*) The classification of end uses was revised in January 1972, and the figures for deliveries to individual industries from the first quarter 1972 are not comparable with those for earlier years.
(*b*) The figures refer to deliveries from the industry direct for export and may differ rom the totals recorded as exports in the monthly trade accounts.

Quarterly analysis of man-made fibres production

Production by weight of synthetic fibres in the second quarter of 1974 was 10 per cent less than in the corresponding period of 1973, while production of viscose and acetate fibres was 1 per cent more. Within the total for synthetic fibres, production of continuous filament yarn decreased by 15 per cent and staple fibre decreased by 4 per cent.

Under the heading 'viscose and acetate', production of continuous filament yarn increased by 9 per cent and staple fibre decreased by 2 per cent compared with the second quarter of 1973.

Analysis of man-made fibre production

Thousand metric tons

	Total		Continuous filament		Staple fibre	
	Synthetic	Viscose +acetate	Synthetic	Viscose +acetate	Synthetic	Viscose +acetate
1968	268.4	270.8	144.3	97.5	124.1	173.3
1969	291.4	262.5	155.9	96.6	135.5	166.0
1970	336.9	262.5	166.6	90.9	170.3	171.6
1971	357.3	255.7	191.2	85.2	166.1	170.6
1972	373.9	252.6	196.4	67.6	177.5	185.0
1973	453.9	277.0	233.0	72.6	220.9	204.4
1972 1st quarter	88.1	57.7	44.9	14.7	43.2	43.0
2nd quarter	95.5	66.4	48.0	17.8	47.5	48.6
3rd quarter	88.5	61.4	46.2	16.9	42.3	44.5
4th quarter	102.0	67.2	57.3	18.2	44.7	49.0
1973 1st quarter	111.8	71.7	59.7	18.4	52.1	53.3
2nd quarter	116.2	70.0	60.6	18.8	55.6	51.2
3rd quarter	107.9	63.5	54.1	16.5	53.8	47.0
4th quarter	118.0	71.9	58.5	19.0	59.5	52.9
1974 1st quarter	105.3	68.7	52.4	17.6	52.9	51.1
2nd quarter	104.6	70.5	51.3	20.4	53.4	50.1

The heading 'Viscose + acetate' includes triacetate.

Bankruptcy records for England and Wales

Details of bankruptcies in England and Wales are maintained in a public search room at Room 901, Thomas More Building, Royal Court of Justice, Strand, London WC2A 2JY.
Searches can be made personally or by an agent and a fee of 25p in respect of each bankruptcy inquiry is payable at the time.

Production of man-made fibres in June

In the 2nd quarter 1974 the volume of production of man-made fibres, seasonally adjusted, was estimated to have been 1 per cent lower than in the 1st quarter 1974. Total production by weight of man-made fibres in the period January-June 1974 was 6 per cent lower than in the corresponding period of 1973; output of continuous filament decreased by 10 per cent and staple fibre decreased by 2 per cent.

Man-made fibre production — Thousand metric tons

	Total	Continuous filament (singles)	Staple fibre
1968	539.1	241.8	297.4
1969	553.9	252.5	301.5
1970	599.4	257.6	341.9
1971	613.1	276.4	336.7
1972	626.5	264.0	362.5
1973	730.8	305.6	425.3
1973 1st quarter	183.5	78.1	105.4
2nd quarter	186.1	79.4	106.7
3rd quarter	171.4	70.6	100.8
4th quarter	189.9	77.5	112.4
1974 1st quarter	174.0	69.9	104.1
2nd quarter	175.1	71.7	103.4
1973 April	59.4	24.3	35.1
May	62.5	26.6	35.9
June	64.2	28.5	35.7
July	59.5	24.1	35.4
August	55.0	22.0	33.0
September	56.8	24.5	32.3
October	67.1	27.3	39.7
November	63.0	25.9	37.1
December	59.8	24.3	35.5
1974 January	57.1	21.7	35.4
February	54.9	22.4	32.5
March	62.1	25.9	36.2
April	63.9	25.6	38.3
May	55.9	24.9	31.0
June	55.3	21.1	34.2

Index of the volume of production — 1970 = 100

1968	87
1969	92
1970	100
1971	106
1972	107
1973	127

	Actual	Seasonally adjusted
1973 1st quarter	129	127
2nd quarter	131	128
3rd quarter	118	125
4th quarter	130	129
1974 1st quarter	120	117
2nd quarter	119	116
1973 April	125	124
May	128	123
June	140	136
July	120	126
August	112	127
September	124	125
October	137	135
November	134	129
December	120	124
1974 January	112	110
February	122	120
March	125	121
April	131	129
May	116	112
June	110	107

The actual figures allow for differences in the length of calendar months but not for holidays or other seasonal variations. The seasonally adjusted figures are based on the seasonal pattern up to the end of 1973, and may be subject to slight revision when the complete figures for 1974 are incorporated.

Tel. 01-212 0531 or 01-212 6474.

Conference

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York 1-3 Nov 1974

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Organised by the Institution of Metallurgists in association with the Department of Industry and the Institution of Corrosion Technology.

Insurance companies in 1973

This article summarises the information on investment and assets held by insurance companies which is provided to the Department of Industry by the British Insurance Association. The previous annual article was published in *Trade and Industry*, 30 August 1973.

Quarterly figures are published in the Business Monitor Miscellaneous Series (M5) under the title 'Insurance Companies' and Private Pension Funds' Investment' obtainable from HM Stationery Office, price 37½p per annum.

Investment in 1973

Insurance companies' total net investment, including changes in agents' balances, etc., was £1,663 million in 1973, as shown in Table 1. This represents a rise of little more than 1 per cent compared with 32 per cent in 1972 and 25 per cent in 1971. Total net investment of long-term funds, at £1,322 million, was £52 million (4 per cent) more than in 1972, while investment of general funds, at £341 million, was £31 million (8 per cent) less than in 1972. Long term funds accounted for 80 per cent of the combined total net investment during 1973, more than in the previous two years but less than in 1970 when they accounted for 84 per cent.

The most striking change in investment behaviour in 1973 for both long term and general funds was a sharp reduction in the proportion of funds allocated to ordinary shares following the marked increase in 1972. Ordinary shares absorbed 21 per cent of net investment of the combined funds during 1973 compared with 41 per cent in 1972 and 29 per cent in 1971. Investment in company securities as a whole fell from 54 per cent of combined total net investment in 1972 to 28 per cent in 1973. This was offset mainly by greater allocations to mortgages and loans, 16 per cent compared with 4 per cent in 1972, and to land, property and ground rents, 18 per cent compared with 8 per cent in 1972. Net investment in British Government securities received much the same percentage allocation of total net investment as in 1972 but there was a renewal of net investment in local authority securities after several years of net disinvestment. These changes in the pattern of investment seem to have been mainly due to the poor yield offered by ordinary shares, combined with lack of confidence in them as a hedge against inflation, and the high yields offered by British Government securities and short term local authority securities. Also, although property values fell substantially during the second half of 1973, property was still considered one of the best hedges against inflation.

Table 2, which gives the pattern of investment for long-term funds, shows that the net investment in company ordinary shares decreased from 42 per cent of the total in 1972 to 21 per cent in 1973. Net investment in debentures also decreased sharply from 12 per cent to 2 per cent, there being few new issues during the year. Increases came mainly in mortgages and loans, 19 per cent in 1973 compared with 3 per cent in 1972, and in land, property and ground rents, 22 per cent in 1973 compared with 10 per cent in 1972. This resulted in most net investment during 1973 being distributed fairly evenly between British Government securities, company securities, mortgages and loans, and property.

For long term funds, as in previous years, most transactions in British Government securities were in long dated securities, with acquisitions of £1,702 million and realisations of £1,523 million. Net investment also took place in medium-dated and undated securities but net disinvestment occurred in short-dated securities. Net investment of £13 million brought to an end a run of several years of disinvestment in local authority securities. Net investment

TABLE 1 Total net investment of insurance companies, 1970-73

£ million

	Combined funds						General funds						Long-term funds					
	Net investment				Assets acquired	Assets realised	Net investment				Assets acquired	Assets realised	Net investment				Assets acquired	Assets realised
	1970	1971	1972	1973	1973	1973	1970	1971	1972	1973	1973	1973	1970	1971	1972	1973	1973	1973
British government and government-guaranteed securities:																		
Period to maturity:																		
Up to 5 years	−37.8	−2.4	28.8	−22.1	474.7	496.8	−21.9	6.6	−3.4	7.6	165.9	158.3	−15.9	−9.0	32.2	−29.7	308.7	338.5
Over 5 years and up to 10 years	10.0	−39.1	−15.7	143.1	424.2	281.1	−1.7	7.7	10.9	28.3	80.5	52.2	11.7	−46.9	−26.6	114.8	343.7	228.9
Over 10 years and up to 15 years	49.6	25.3	−7.8	24.9	324.8	299.9	22.3	10.2	−1.8	−2.3	34.0	36.3	27.2	15.1	−5.9	27.3	290.8	263.6
Over 15 years	39.1	492.9	311.1	169.0	1,807.2	1,638.3	−6.8	63.2	28.7	−10.6	104.9	115.5	45.8	429.7	282.4	179.5	1,702.3	1,522.8
Undated	14.4	27.5	−28.0	3.8	157.0	153.2	−1.0	−0.2	−1.2	−0.2	2.2	2.3	15.4	27.7	−26.8	4.0	154.8	150.9
Total	75.2	504.2	288.4	318.6	3,187.8	2,869.2	−9.0	87.6	33.2	22.8	387.5	364.7	84.2	416.6	255.2	295.8	2,800.3	2,504.5
United Kingdom local authorities, etc., securities	−12.9	−12.9	−12.3	16.6	53.5	36.9	0.5	—	−3.2	4.0	13.9	9.9	−13.4	−12.9	−9.1	12.6	39.6	27.0
Company securities:																		
Ordinary shares	261.5	365.3	679.9	356.7	1,136.8	780.1	29.1	70.0	144.7	80.2	235.2	155.0	232.4	295.3	535.1	276.5	901.6	625.1
Unit trust units (1)	9.0	10.7	30.0	29.9	32.7	2.8	—	0.4	—	−0.4	0.1	0.5	9.0	10.3	30.0	30.3	32.6	2.3
Preference shares	−2.0	−4.5	2.8	10.4	33.1	22.7	16.5	1.8	13.6	9.1	17.1	8.0	−18.5	−6.3	−10.8	1.3	16.0	14.7
Debentures, etc.	94.0	115.6	166.0	62.9	284.2	221.2	5.0	11.7	16.6	33.2	58.6	25.3	89.1	103.9	149.4	29.7	225.6	195.9
Total	362.6	487.1	878.7	459.9	1,486.8	1,026.8	50.5	83.9	174.9	122.1	311.0	188.9	312.0	403.1	703.8	337.8	1,175.8	838.0
Other investments:																		
Mortgages and loans:																		
Home:																		
House purchase loans	36.0	14.9	3.1	120.7	258.7	138.0	2.2	3.6	23.9	11.8	23.6	11.8	33.8	11.3	−20.8	108.9	235.1	126.2
Other mortgages and loans	98.1	41.9	50.8	141.9	307.6	165.7	20.4	11.7	5.3	3.2	38.0	34.8	77.7	30.3	45.5	138.7	269.6	130.8
Overseas	2.8	1.6	10.0	3.2	9.6	6.3	0.3	−0.1	0.3	−1.5	1.1	2.6	2.4	1.7	9.7	4.7	8.4	3.7
Overseas government, etc., securities	0.5	1.9	0.7	2.4	22.8	20.4	−0.1	2.2	−3.1	1.4	8.7	7.3	0.6	−0.3	3.8	1.0	14.1	13.0
Land, property and ground rent	197.5	198.1	131.1	306.8	396.4	89.6	−5.1	9.1	6.3	21.4	32.1	10.7	202.6	189.0	124.8	285.4	364.3	78.9
Other	−0.1	−0.1	0.1	0.1	0.3	0.2	—	—	—	0.1	0.1	—	−0.1	−0.1	0.1	—	0.2	0.2
Total	334.8	258.3	195.9	575.2	995.3	420.1	17.7	26.5	32.7	36.4	103.7	67.3	317.1	231.8	163.2	538.8	891.6	352.8
Total of investments	759.6	1,236.6	1,350.8	1,370.4	5,723.4	4,353.0	59.7	197.9	237.6	185.4	816.1	630.7	699.9	1,038.7	1,113.1	1,185.0	4,907.3	3,722.3
Cash and short-term assets (2)	152.1r	−49.7r	202.3r	201.1			40.9r	35.4r	86.9r	75.3			111.2r	−85.1r	115.4r	125.7		
Agents' balances, etc.	81.9	54.9	88.9	91.6			56.1	37.6	47.5	80.1			25.8	17.3	41.4	11.4		
Total net investment (2)	993.7r	1,241.8r	1,642.0r	1,663.0			156.7r	270.9r	372.1r	340.8			837.0r	970.9r	1,269.9r	1,322.2		

(1) Prior to 1970 investment in Unit trust units was not separately reported and is likely to have been included under 'Ordinary shares' or 'Other assets'.
(2) r = Revised. The figures for 1970 to 1972 have been revised to give a consistent presentation of changes in cash and short term assets.
— = Nil or less than £0.05 million.

in house purchase loans (£109 million), other mortgages and loans (£139 million), and property (£285 million) all reached record levels. Cash and short term assets were also built up by more than in any previous year but the increase in agents' balances, etc., was less than any recorded since 1965.

Table 3, which gives the pattern of investment in general funds, shows that the proportion of total net investment allocated to ordinary shares was also severely reduced in this sector, from 39 per cent in 1972 to 24 per cent in 1973, although net investment in debentures increased. Other changes in the distribution of net investment were relatively small except for the increase in agents' balances, etc., which at £80 million is the highest recorded. This is in sharp contrast to the decrease in agents' balances, etc., in long term funds and may have been due to the influence of high interest rates, which could have encouraged increases in outstanding payments. In long term funds the timing of payments tends to be more systematic.

Holdings of assets

Table 4 shows that the reported value of total assets held for long-term funds was £18,125 million at the end of 1973, an increase of 9 per cent over the level at the end of 1972. The most marked increase was the rise in book value of holdings of land, property and ground rents, from £2,120 million at the end of 1972 to £2,636 at the end of 1973, bringing them from 13 per cent to 14 per cent of total assets. Holdings of British Government securities for long-term funds increased by £365 million at nominal values during 1973 while accounting for the same proportion of total assets as at the end of 1972. Holdings of company securities at book values, increased by £272 million although accounting for a lower proportion of total assets, 41 per cent at the end of 1973 compared with 44 per cent at the end of 1972. Holdings of mortgages and loans, also at book values, increased by £252 million while accounting for the same proportion of total assets as at the end of 1972. Holdings of cash and other short-term assets rose by £126 million to become 2 per cent of total assets. Other changes were relatively small.

The reported value of total assets held for general funds rose by £405 million to £2,933 million during 1973, an increase of 16 per cent. The largest increase came in holdings of company securities although, as for long-term funds, these ended the year accounting for a slightly smaller proportion of total assets, 39 per cent at the end of 1973 compared with 40 per cent at the end of 1972. Holdings of land, property and ground rents increased by £62 million, accounting for 10 per cent of total assets at the end of 1973 compared with 9 per cent one year earlier. Holdings of cash and other short-term assets rose by £75 million, increasing their share of total assets from 11 per cent to 12 per cent. Agents' balances, etc., rose by £80 million to £561 million at the end of 1973, in contrast to the much smaller increase in this item in long-term funds.

Notes and definitions

These statistics cover:

a United Kingdom companies which are members of the British Insurance Association, that is those whose parent company is registered and whose head office is in the United Kingdom.

b Commonwealth life companies which are members of the British Insurance Association, in respect of their United Kingdom business.

c Collecting Friendly Societies.

The returns include assets held in respect of money remitted by overseas branches and subsidiaries, but they exclude direct investment by a United Kingdom company in its overseas branches or subsidiaries, as well as financial assets held by or on behalf of those branches, even if held in the United Kingdom.

TABLE 2 Pattern of investment of long-term insurance funds (1)

	Percentage of totals							
	Holdings of assets				Net investment in assets			
	End 1970	End 1971	End 1972	End 1973	1970	1971	1972	1973
British government and government guaranteed securities	22	24	23	23	10	43	20	22
United Kingdom local authorities, etc., securities	3	2	2	2	−2	−1	−1	1
Company securities:								
Ordinary shares	23	24	26	25	28	30 r	42 r	21
Unit trust units (2)	—	—	1	1	1	1	2	2
Preference shares	1	1	1	1	−2	−1	−1	—
Debentures, etc.	17	16	15	14	11	11	12	2
Mortgages and loans	17	16	15	15	14	4	3	19
Land, property and ground rents	12	13	13	14	24 r	19	10	22
Other investments (including overseas government, etc., securities)	1	1	1	1	—	—	—	—
Cash and other short-term assets	2	1	2	2	13 r	−9	10 r	10
Agents' balances, etc.	2	2	2	2	3	2	3	1
Total	100	100	100	100	100	100	100	100
£ million	13,781	15,011	16,574	18,125	837 r	971 r	1,270 r	1,322

(1) Holdings of British government and government guaranteed securities and United Kingdom local authorities, etc., securities are at nominal values: other assets are at book values Net investment in assets is at cash transaction values.
(2) Prior to 1970 investment in Unit trust units was not separately reported and is likely to have been included under 'Ordinary shares' or 'Other assets'.

TABLE 3 Pattern of investment of general insurance funds (1)

	Percentage of totals							
	Holdings of assets				Net investment in assets			
	End 1970	End 1971	End 1972	End 1973	1970	1971	1972	1973
British government and government guaranteed securities	12	14	12	12	−6	32 r	9	7
United Kingdom local authorities, etc., securities	2	2	1	1	—	—	−1	1
Company securities:								
Ordinary shares	27	28	31	30	19	26	39	24
Unit trust units (2)	—	—	—	—	—	—	—	—
Preference shares	7	5	5	4	11	1	4	3
Debentures, etc.	5	4	5	5	3	4 r	4 r	10
Mortgages and loans	5	5	5	5	15	6	8	4
Land, property and ground rents	6	9	9	10	−3	3	2	6
Other investments (including overseas government, etc., securities)	2	2	2	1	—	1	−1	—
Cash and other short-term assets	10	10	11	13	26	13 r	23 r	22
Agents' balances, etc.	24	21	19	19	36	14	13	23
Total	100	100	100	100	100	100	100	100
£ million	1,671	2,089	2,528	2,933	157 r	271 r	372 r	341

(1) Holdings of British government and government guaranteed securities and United Kingdom local authorities, etc., securities are at nominal values: other assets are at book values. Net investment in assets is at cash transaction values.
(2) Prior to 1970 investment in Unit trust units was not separately reported and is likely to have been included under 'Ordinary shares' or 'Other assets'.

Thus the figures of holdings of assets differ from other published insurance statistics. The British Insurance Association itself publishes each year total investments of its British members. These figures differ in two important respects from those of holdings of assets published in the present article. First, the annual statistics published by the British Insurance Association includes assets of overseas subsidiaries of United Kingdom companies and, second, public sector securities in the present statistics are at nominal values while in the Association's figures they are at book values.

The figures differ from those published by the Department of Trade in the Annual Summaries of Statements of Insurance Business published under the Insurance Companies Act, 1958 as amended, in additional respects; the latter give assets divided between companies carrying on long-term business and other companies, compared with the breakdown between long-term assets and other assets in this article. The annual summaries also include companies which are not members of the British Insurance Association, but these are very small in relation to the total.

The Collecting Friendly Societies are not included in the annual summaries published under the 1958 Act, but one of the largest members of the Association of Collecting Friendly Societies is a member of the British Insurance Association and is included in the figures published by the British Insurance Association.

Cash and short-term assets include cash in hand and with United Kingdom banks, United Kingdom Treasury bills and local authority bills and temporary money, and other short-term assets held in the United Kingdom or overseas.

Holdings of public sector securities are at nominal values; holdings of other investments are at book values. Transactions in assets are at cash values. Net investment is the difference between the value of assets acquired and the value of assets realised.

Public sector securities include British Government and Government guaranteed securities and United Kingdom local authority securities (including Harbour Boards, Water Boards, etc.). Treasury bills and local authority bills are not included under this heading. Securities with optional redemption dares are classified by their final date. Conversions on maturity are omitted from the statistics of transactions in assets.

Since the publication of figures for 1973 in the Business Monitor (M5) in April 1974, they have been revised to include agents' balances, etc., which are only available annually. This item includes outstanding premiums, interest accrued, and outstanding interest, dividends and rents, and worldwide re-insurance balances, which is probably the largest component.

Figures given in the various tables in this article have been rounded, and totals are not always exactly equal to the sum of their components.

The statistics shown in Table 4 can give only a broad picture of the distribution of insurance companies' assets because of the different bases of valuation.

Changes in book values between the end of one year and of the next do not correspond to the cash value of transactions during the year because of revaluations.

Changes between one year and the next in the statistics of holdings of public sector securities by maturity dates are affected by the transfer of stocks from longer to shorter maturity classifications.

TABLE 4 Financial assets held by insurance companies, 1970-73

£ million, end period

	Combined funds				General funds				Long-term funds			
	1970	1971	1972	1973	1970	1971	1972	1973	1970	1971	1972	1973
PUBLIC SECTOR SECURITIES AT NOMINAL VALUES:												
British government and government guaranteed securities:												
Period to maturity:												
Up to 5 years	79	117	151	176	35	60	62	93	44	57	89	83
Over 5 and up to 10 years	169	209	226	373	28	43	58	77	141	168	167	296
Over 10 and up to 15 years	225	170	177	619	41	41	29	43	184	129	148	576
Over 15 years	2,199	2,669	2,947	2,720	85	138	160	123	2,115	2,532	2,787	2,596
Undated	591	664	604	620	5	6	4	14	585	659	600	605
Total	3,263	3,829	4,104	4,507	194	287	313	351	3,069	3,542	3,791	4,156
United Kingdom local authorities, etc., securities:												
Period to maturity:												
Up to 5 years	77	81	87	127	15	16	15	17	62	65	72	110
Over 5 years and up to 10 years	119	114	103	89	13	13	11	11	106	100	92	78
Over 10 and up to 15 years	62	62	58	58	6	6	7	8	56	57	51	51
Over 15 years	129	115	109	93	6	5	4	4	123	110	105	89
Undated	33	33	32	32	1	1	—	1	31	32	32	31
Total	419	405	389	399	41	41	37	40	378	364	353	358
Total of public sector securities	3,682	4,234	4,493	4,906	235	328	349	392	3,447	3,906	4,144	4,514
OTHER ASSETS AT BOOK VALUES:												
Company securities: (1)												
Ordinary shares	3,645	4,141	5,148	5,464	443	590	775	867	3,202	3,552	4,373	4,597
Unit trust units (2)	35	66	106	119	—	1	1	1	35	65	105	118
Preference shares	318	312	308	309	113	112	123	128	206	201	185	181
Debentures, etc.	2,386	2,533	2,670	2,734	81	95	116	139	2,305	2,439	2,555	2,594
Total	6,385	7,053	8,232	8,625	637	796	1,014	1,135	5,747	6,256	7,218	7,490
Mortgages and loans:												
Home: House purchase loans	1,154	1,172	1,169	1,290	37	40	59	72	1,117	1 132	1 110	1,218
Other mortgages and loans	1,230	1,296	1,336	1,487	45	49	52	61	1,186	1,248	1,283	1,425
Overseas	39	48	48	53	10	9	9	12	29	39	39	41
Overseas government, etc., securities	124	127	132	136	38	39	40	40	86	88	93	96
Land, property and ground rents	1,797	2,125	2,354	2,932	106	192	234	296	1,692	1,932	2,120	2,636
Other	—	—	—	—	—	—	—	—	—	—	—	—
Total	4,345	4,768	5,039	5,898	236	329	394	481	4,109	4,438	4,645	5,417
Total of other securities and assets	14,411	16,055	17,764	19,429	1,108	1,454	1,758	2,008	13,303	14,601	16,007	17,421
Cash and short-term assets	399	349	551	752	166	202	289	364	233	148	263	389
Agents' balances, etc.	642	696	785	877	396	434	481	561	245	263	304	315
Total assets	15,452	17,100	19,101	21,058	1,671	2,089	2,528	2,933	13,781	15,011	16,574	18,125

(1) The figures include investments in companies registered overseas. These holdings, for long term and general funds combined, in £ million, with holdings of ordinary shares shown in brackets, were as follows:

Companies registered in:	USA	Overseas sterling area and Canada	Other overseas countries
1970	285 (258)	171 (123)	45 (36)
1971	290 (265)	171 (125)	68 (59)
1972	385 (356)	216 (169)	124 (113)
1973	459 (423)	208 (173)	166 (156)

(2) Prior to 1970 investment in unit trust units was not separately reported and is likely to have been included under ordinary shares or other assets.

Private pension funds in 1973

This article discusses recent trends in the transactions and the assets of the self-administered private pension funds of industrial and commercial companies and non-profit making bodies which do not operate their pension schemes through insurance companies. Funds of co-operative societies are not included. The article summarises investment by these funds during 1973 and the assets held by them at the end of 1973, together with comparable figures for earlier years.

Quarterly figures are published in Business Monitor M5 'Insurance Companies' and Private Pension Funds' Investment' obtainable from HMSO, price 37½p per annum.

Transactions in assets in 1973

Total net investment by the funds during 1973 is estimated to have been £556 million, an increase of 36 per cent on estimated net investment during 1972, compared with increases of 11 per cent between 1971 and 1972 and of 6 per cent between 1970 and 1971. Figures of the net investment by the funds are shown in Table 1.

The main features of investment during 1973 were a sharp reduction in net investment in ordinary shares, offset by renewed net investment in British Government securities, and increases to new peaks of net investment in mortgages and loans, in land, property and ground rents, and in other short term assets. These changes were mainly due to the poor yields offered by ordinary shares combined with lack of confidence in them as a hedge against inflation. Although property values fell substantially during the second half of 1973, property was still considered one of the best hedges against inflation.

Net investment in ordinary shares fell to £125 million, 23 per cent of total net investment, compared with £276 million, 67 per cent of the total, in 1972. There was renewed net investment in debentures, although at £19 million this was still at its lowest level, apart from 1972, for over 10 years, there being few new issues during 1973.

Following disinvestment of £31 million during 1972, net investment in British Government securities recovered to £103 million, the highest level recorded apart from the exceptional level of £175 million during 1971. Most net investment, and most transactions, took place in long-dated securities. Net investment also occurred in medium-dated and, to a lesser extent, undated securities with net disinvestment in short-dated securities. In local authority securities net disinvestment took place for the fifth year running; sales exceeded purchases by £4 million, much the same level of disinvestment as in 1972. For public sector securities as a whole there was net investment of £99 million, 18 per cent of total net investment, compared with disinvestment of £35 million, 9 per cent of total net investment, during 1972.

Net investment in mortgages and loans, which has never exceeded £5 million during earlier years, rose to £31 million, 5 per cent of total net investment. In overseas government, etc., securities net disinvestment continued for the sixth year running. At £13 million net investment in property unit trust units was at its lowest level for the six years that this item has been shown separately. Net investment in land, property and ground rents rose to £89 million, 16 per cent of total net investment and much the same proportion as in 1972. Cash and short-term assets net were again built up during 1973, this time by £170 million (31 per cent of total net investment), the highest level so far recorded.

TABLE 1 Total net investment by private pension funds, 1970 to 1973 (1)

	£ million				Per cent				£ million	
	Net investment				Percentage of total investment				Assets acquired	Assets realised
	1970	1971	1972	1973	1970	1971	1972	1973	1973	1973
British government and government guaranteed securities:										
Period to maturity:										
Up to 5 years	−7.2	7.3	−1.4	−15.5	*−2.1*	*2.0*	*−0.4*	*−2.8*	163.8	179.3
Over 5 and up to 10 years	−16.1	−7.6	4.4	43.1	*−4.6*	*−2.1*	*1.1*	*7.7*	129.1	85.9
Over 10 and up to 15 years	46.5	−17.1	−3.7	−10.7	*13.3*	*−4.6*	*−0.9*	*−1.9*	66.1	76.8
Over 15 years	−44.4	181.0	−19.7	81.9	*−12.7*	*49.2*	*−4.8*	*14.7*	357.6	275.7
Undated	1.2	11.8	−10.5	4.0	*0.3*	*3.2*	*−2.6*	*0.7*	30.8	26.8
Total	−20.0	175.4	−30.9	102.9	*−5.7*	*47.7*	*−7.5*	*18.5*	747.4	644.5
United Kingdom local authority securities:										
Quoted:										
Period to maturity:										
Up to 10 years	−8.3	−17.3	−6.3	1.7	*−2.4*	*−4.7*	*−1.5*	*0.3*	13.3	11.6
Over 10 and up to 15 years	—	−2.7	−0.4	0.7	*—*	*−0.7*	*−0.1*	*0.1*	2.0	1.3
Over 15 years and undated	−1.2	0.4	3.8	−6.9	*−0.3*	*0.1*	*0.9*	*−1.2*	3.8	10.6
Unquoted	0.1	−2.5	−1.6	0.8	*—*	*−0.7*	*−0.4*	*0.1*	11.6	10.8
Total	−9.5	−22.1	−4.5	−3.6	*−2.7*	*−6.0*	*−1.1*	*−0.6*	30.7	34.3
Total of public sector securities	−29.5	153.2	−35.4	99.2	*−8.5*	*41.6*	*−8.6*	17.8	778.1	678.8
Company securities:										
Ordinary shares	164.6	169.8	276.3	125.5	*47.2*	*46.1*	*67.5*	*22.6*	820.2	694.7
Preference shares	3.8	0.2	3.3	6.7	*1.1*	*0.1*	*0.8*	*1.2*	23.3	16.6
Debentures, etc.	50.4	48.7	−1.1	19.2	*14.5*	*13.2*	*−0.3*	*3.4*	145.3	126.1
Total	218.9	218.7	278.5	151.4	*62.8*	*59.4*	*68.1*	*27.2*	988.8	837.3
Other investments:										
Mortgages and loans	2.2	0.4	−5.1	30.9	*0.6*	*0.1*	*−1.2*	*5.5*	76.6	45.6
Overseas government, etc., securities	−2.7	−3.6	−3.3	−0.8	*−0.8*	*−1.0*	*−0.8*	*−0.1*	6.0	6.8
Property unit trust units	17.8	27.6	30.4	13.0	*5.1*	*7.5*	*7.4*	*2.3*	18.8	5.8
Land, real property and ground rents	51.9	44.7	68.4	89.4	*14.9*	*12.1*	*16.7*	*16.1*	103.5	14.1
Other	0.9	2.1	1.7	3.0	*0.3*	*0.6*	*0.4*	*0.5*	4.8	1.8
Total	70.1	71.2	92.1	135.5	*20.1*	*19.3*	*22.5*	*24.3*	209.6	74.1
Total of investments	259.5	443.1	335.2	386.2	*74.4*	*120.4*	*81.9*	*69.4*	1,976.4	1,590.2
Short-term assets and liabilities:										
Cash in hand and with UK banks	21.4	−4.8	87.6	35.3	*6.1*	*−1.3*	*21.4*	*6.3*		
UK local authority bills and temporary money	23.1	17.4	19.9	24.5	*6.6*	*−4.7*	*4.9*	*4.4*		
Other short-term assets	35.3	−27.2	40.6	97.3	*10.1*	*−7.4*	*9.9*	*17.5*		
Short-term liabilities(2)	+9.5	−25.7	−74.2	+13.2	*+2.7*	*−7.0*	*−18.1*	*+2.4*		
Total	89.2	−75.1	74.0	170.3	*25.6*	*−20.4*	*18.1*	*30.6*		
Total net investment	348.7	368.0	409.2	556.5	*100.0*	*100.0*	*100.0*	*100.0*		

(1) Including estimates for private self-administered pension funds not contributing to the inquiries. The figures exclude funds of co-operative societies.
(2) An increase is indicated by a minus sign, a decrease by a plus sign.
— = Nil or less than £0.05 million.

Holdings of assets

The value of holdings of the various types of assets held by the funds is estimated to have decreased by 12 per cent from £7,028 million at the end of 1972 to £6,199 million at the end of 1973. An analysis of the holdings of assets is given in Table 2. Apart from slight falls in 1966 and 1969, this is the first time for at least 12 years that the value of holdings has decreased. This change is almost entirely accounted for by the fall in market value of the ordinary share holdings during the course of the year. Despite continuing net investment in ordinary shares, although at a lower level than in 1972, the value of the holdings fell by 25 per cent from £4,341 million at the end of 1972 to £3,263 at the end of 1973. Preference share holdings increased slightly in value, but the value of debenture holdings also decreased. The value of holdings of company securities as a whole fell by 23 per cent from £5,219 million to £4,002 million. Holdings of public sector securities also fell but by only 4 per cent.

Holdings of property unit trust units increased by £25 million and holdings of land, property and ground rents increased by £178 million. Holdings of cash and net other short-term assets nearly doubled from £218 million to £409 million. Other changes were relatively small.

The distribution of holdings between the various types of security changed considerably from the distribution at the end of 1972, reflecting the large changes in investment behaviour and market valuations during the year. Holdings of British Government securities, at about 12 per cent of the value of total assets at the end of 1973 compared with 11 per cent one year earlier, showed only a small change. But holdings of company securities fell sharply from 74 per cent to 65 per cent of the total, considerably lower than at the end of any of the previous six years. On the other hand, holdings of other assets, which have been steady at about 11 per cent of the total since the end of 1969, showed an increase to 17 per cent at the end of 1973. Within this category the largest change came in holdings of land, real property, and ground rents, which rose from 8 per cent to 12 per cent of the total. Holdings of cash and other short-term assets also increased from 3 per cent to 7 per cent, the highest level for over ten years.

Notes and definitions

The statistics relate to the self-administered pension and superannuation funds of the private sector, including those of companies and non-profit making bodies. Respondents are asked to make returns covering financial assets of funds whose investment policy is managed from within the United Kingdon, including the funds of any subsidiary companies. Some undertakings operate two or more pension funds; such funds have been treated as single funds in the statistics.

Funds which operate primarily through insurance companies and funds of local authorities, public corporations or central government are not included. All funds with assets of £1 million or more have contributed to the inquiries, although not all of them have been able to give fully detailed statistics. About 1 in 4 of funds with assets of £0.1 million but less than £1 million contribute to the statistics, while funds with assets below £0.1 million are not approached. Estimates have been made of quarterly transactions of, and assets held by, funds not included in the sample or which did not respond.

All the funds were asked if possible to give their marketable securities at 31 December at current market values. Funds representing just under 9 per cent of the total assets reported in the inquiry gave figures on a basis other than market value. Funds representing 22 per cent of total assets reported gave figures of assets for a date other then the calendar year (usually the end of March).

Short-term assets are those maturing within one year of originating date including loans payable at lender's option within one year of the date of issue. They include Treasury bills and local authority bills for temporary money. Balances due to stockholders on securities sold for future settlement have been deducted from short-term assets.

Totals in the tables are not always equal to the sum of their components because of rounding.

TABLE 2 Assets held by private pension funds, 1970 to 1973 (1)

	Assets				Percentage of total assets			
	1970	1971	1972 r	1973	1970	1971	1972 r	1973
	£ million				Per cent			
British government and government guaranteed securites	552.2	785.1	683.7	668.2	*11.7*	*12.7*	*9.7*	*10.8*
United Kingdom local authority securities	138.9	112.1	105.1	90.7	*3.0*	*1.8*	*1.5*	*1.5*
Total	691.1	897.2	788.8	758.9	*14.7*	*14.5*	*11.2*	*12.2*
Company securities:								
Ordinary shares	2,481.1	3,616.1	4,340.6	3,263.3	*52.9*	*58.6*	*61.8*	*52.6*
Preference shares	28.9	21.9	21.8	28.5	*0.6*	*0.4*	*0.3*	*0.5*
Debentures, etc.	725.7	840.7	856.6	710.0	*15.5*	*13.6*	*12.2*	*11.5*
Total	3,235.7	4,478.7	5,218.9	4,001.8	*69.0*	*72.5*	*74.2*	*64.6*
Other assets:								
Mortgages and loans	46.5	40.1	45.1	45.8	*1.0*	*0.6*	*0.6*	*0.7*
Overseas government, etc., securities	27.0	25.0	21.1	19.9	*0.6*	*0.4*	*0.3*	*0.3*
Property unit trust units	106.6	124.9	178.7	204.0	*2.3*	*2.0*	*2.5*	*3.3*
Land, real property and ground rents	381.6	477.2	545.1	722.8	*8.1*	*7.7*	*7.8*	*11.7*
Other	10.4	15.5	12.3	36.1	*0.2*	*0.3*	*0.2*	*0.6*
Total	572.1	682.7	802.2	1,028.5	*12.2*	*11.1*	*11.4*	*16.6*
Cash and other short-term assets, net	187.6	116.1	217.7	409.5	*4.0*	*1.9*	*3.1*	*6.6*
Total assets	4,686.6	6,174.8	7,027.6	6,198.7	*100.0*	*100.0*	*100.0*	*100.0*

(1) Funds were asked to give their holdings of assets at current market values (see 'Notes and definitions'). The figures include estimates for private self-administered pension funds not contributing to the annual inquiries, but excluding funds of co-operative societies.

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Estimates of food supplies moving into consumption in the United Kingdom

These notes and statistical tables summarise the official estimates of total food consumption per head in the United Kingdom for the years 1970 to 1973(1).

The total supplies of food from all sources, that is home production plus imports, are assessed in each year; to arrive at the total moving into human consumption, deductions are made for exports, waste and non-food uses and account is taken of changes in measured stocks. The resulting total is then divided by the mid-year population to give average consumption per head.

The theory is simple, but in practice there are considerable difficulties in measuring supplies, ensuring complete coverage and avoiding duplication. Imports are well recorded, and few problems exist in estimating the amounts of these going for human consumption. Sources of statistics for home production are more numerous and include information derived from the agricultural census returns, from processors of manufactured foods and sample surveys. When dealing with processed foodstuffs in Tables 1-5, consideration has to be given to the stage in the manufacture at which the supply is to be measured: for example, as wheat, as flour, or as bread. It has been found from experience that the most convenient point to measure the product is at the first stage of processing. Thus, in the example given, the supply would be the quantity of flour produced; the figures therefore represent disappearance into distribution rather than final consumption.

No information is available on changes in retail stocks, and where measurement of changes in stocks held elsewhere is incomplete, it is assumed that such end-year stocks remain constant; this may to some extent affect year-to-year comparisons of non-perishable foodstuffs such as sugar, tea and coffee.

Whenever possible, attempts are made to aggregate in appropriate units within sub-groups so that sub-totals can be shown; for example, in the Dairy Products group the total is shown in the form of milk-solid equivalents. The conversion factors used are reviewed periodi-

(1) Estimates for the pre-war years, based on offical figures for various periods between 1934 and 1939, and for the years 1940 to 1966 were published in the *Board of Trade Journal*, Vol. 194, No. 3703, pp. 753-759; revised estimates for 1955-1972 were published in *Trade and Industry*, Vol. 12, No. 9, pp. 459-466. A revised estimate for 1972 and provisional results for 1973 were published in *Trade and Industry*, Vol. 15, No. 5, pp. 254-255.

TABLE 1 Food supplies per head per annum moving into consumption in the United Kingdom (lb. per head per annum)

	1970	1971	1972	1973
I. DAIRY PRODUCTS (excluding butter)				
Liquid milk	311.1	306.5	306.5	310.1
(pints per head per annum)	(241.5)	(237.9)	(238.0)	(240.7)
of which, school and welfare milk (pints)	(37.7)	(16.7)	(6.9)	(6.2)
Cream (40 per cent fat content)	3.2	3.3	3.3	3.5
Cheese	11.8	12.5	12.0	12.7
Evaporated milk, full cream, unsweetened	5.2	5.1	4.7	4.8
Condensed milk, full cream, sweetened	0.9	0.8	0.6	0.6
Condensed milk, machine skimmed	2.5	2.8	2.6	2.5
Dried whole milk	1.2	1.3	1.6	1.2
Dried skimmed milk	3.3	3.2	3.4	2.7
Yoghurt	15.4	16.4	17.9	3.2
Milk as liquid in manufactured products nes				15.9
Total (converted to milk solids)	56.1	56.1	56.6	56.7
II. MEAT				
Beef – bone in	41.6	40.9	36.9	33.7
Beef – bone out	5.6	5.1	7.4	7.7
Mutton and lamb	21.2	22.1	20.4	18.2
Pork	24.4	26.0	27.2	26.8
Offal	7.7	7.8	8.1	7.6
Canned meat (imported)	7.4	7.6	7.8	7.7
Bacon and ham	25.2	26.2	24.7	22.3
Poultry	23.6	23.6	26.8	25.8
Game and rabbits	0.6	0.6	0.6	0.6
Total (converted to edible weight)	132.1	134.2	134.5	126.5
III. FISH				
Fresh, frozen and cured (wet fillet equivalent)	16.1	14.8	14.1	13.6
Shell fish, fresh and frozen (edible weight)	1.2	1.1	1.2	1.6
Canned fish (imported)	2.3	2.5	3.0	2.9
Total (edible weight)	19.6	18.4	18.3	18.1
IV. EGGS				
Shell eggs (number)	251	255	253	244
Egg products (equivalent number of eggs)	24	19	20	18
Total	275	274	273	262
V. OILS AND FATS (visible)				
Butter	19.4	18.0	15.9	16.7
Margarine (gross)	11.9	12.7	14.0	12.8
(net) (a)	11.1	12.1	13.1	12.0
Lard and compound cooking fat	12.1	11.2	12.4	12.0
Other edible oils and fats	13.9	13.5	12.3	14.2
Total (converted to fat content)	51.3	49.7	48.8	50.1
VI. SUGAR AND SYRUPS				
Sugar refined (b) (i) (gross)	106.0	104.1	105.6	103.7
(ii)	102.0	99.9	101.4	99.2
(iii) (net)	97.1	95.6	97.6	95.0
Honey	0.8	0.9	0.7	0.8
Glucose	11.7	12.0	13.1	14.0
Total (sugar content) (gross)	116.7	115.1	117.5	116.4
(net)	107.6	106.4	109.2	107.5
VII. FRUIT				
Fresh citrus fruit	21.9	23.1	20.7	22.2
Other fresh fruit	54.5	54.3	49.8	48.8
Canned fruit	18.3	17.2	17.8	20.4
Imported fruit juices (in natural strength)	5.4	7.6	7.3	7.8
Imported fruit pulp	1.4	1.5	1.6	2.0
Imported dried fruit	5.4	5.4	5.8	5.3
Total (converted to fresh equivalent)	124.7	129.2	124.0	125.7
VIII. PULSES and NUTS				
Dried pulses (c)	7.4	7.0	7.2	7.5
Shelled nuts and soya flour	5.1	4.7	5.5	6.0
Total	12.5	11.7	12.7	13.5
IX. POTATOES AND POTATO PRODUCTS (d)				
Total including the following products	228.2	221.4	215.4	216.5
Crisps	13.8	14.7	15.3	17.5
Frozen and par-fries	7.6	7.9	9.1	14.8
Canned and dehydrated	10.9	8.3	7.9	9.5
Pre-peeled	2.6	3.0	3.4	3.8
X. OTHER VEGETABLES				
Fresh tomatoes	13.4	13.1	12.4	12.6
Imported canned tomatoes (including juice and puree)	6.9	6.9	8.0	9.0
Cabbage and greens	36.1	36.0	37.1	36.0
Leafy salads	4.3	4.6	4.7	4.9
Fresh carrots	11.5	11.7	11.4	12.0
Fresh legumes	22.4	18.4	21.5	23.1
Other fresh vegetables	27.8	29.2	28.9	30.7
Other canned vegetables (e)	10.0	8.2	8.9	11.1
Total (converted to fresh equivalent)	138.8	134.0	139.2	147.5
XI. GRAIN PRODUCTS				
Wheat flour	146.0	143.5	141.8	141.6
Barley products	0.4	0.3	0.3	0.3
Oat products	2.7	2.8	3.3	3.1
Rye products	0.5	0.5	0.5	0.5
Breakfast cereals	6.8	6.5	7.1	7.9
Rice	3.0	3.9	3.7	3.7
Starch and other farinaceous foods	3.5	3.1	2.0	3.1
Total	162.9	160.6	158.7	160.2
XII. TEA, COFFEE AND COCOA				
Tea	8.6	8.2	8.0	7.5
Coffee (bean equivalent) (f)	4.4	4.7	4.4	5.9
Cocoa powder	1.0	1.0	1.2	1.2
XIII. ALCOHOLIC DRINK (g)				
Spirits (proof pints) (h)	2.8	3.0	3.4	4.3
Beer (pints)	178.6	185.4	189.5	197.0
Wine (pints)	6.6	7.8	8.9	11.2
XIV. ENERGY VALUE (Kcal. per head per day)				
Food (including coffee and cocoa)	3,110	3,080	3,070	3,050
Alcoholic drink	129	136	142	154

(a) Excluding ingredients shown as separate items elsewhere in the tables (eg butter and lard).

(b) (i) Total consumption of sugar including sugar content of imported manufactured foods;

(ii) = (i) less sugar used in production of alcholic drinks;

(iii) = (i) less sugar used in alcholic drinks and sugar content of products covered elsewhere in the table to provide for the calculation of calories.

(c) Includes dried beans and dried peas for canning.

(d) Raw equivalent. From 1970 par-fries are included with frozen potatoes. For earlier years they are aggregated with canned and dehydrated potatoes.

(e) Excludes canned dried peas, canned dried beans (beans in tomato sauce, etc.), and canned tomatoes.

(f) Including coffee extracts and essences.

(g) Quantities retained for home use, based on information provided by HM Customs and Excise.

(h) Excludes medical spirit.

TABLE 2 Summary of the main food groups from Table 1

(lb. per head per annum)

	1970	1971	1972	1973
Dairy products (excluding butter) (as milk solids)	56.1	56.1	56.6	56.7
Meat (including canned meat, bacon and ham) (as edible weight)	132.1	134.2	134.5	126.5
Fish (edible weight)	19.6	18.4	18.3	18.1
Eggs and egg products (number)	275	274	273	262
Oils and fats (visible) (fat content)	51.3	49.7	48.8	50.1
Sugar and syrups (sugar content gross) (a)	116.7	115.1	117.5	116.4
Fruit (as fresh equivalent)	124.7	129.2	124.0	125.7
Pulses and nuts	12.5	11.7	12.7	13.5
Potatoes	228.2	221.4	215.4	216.5
Other vegetables (as fresh equivalent)	138.8	134.0	139.2	147.5
Grain products	162.9	160.6	158.7	160.2
Tea	8.6	8.2	8.0	7.5

(a) For further breakdown see Table 1.

cally in the light of up-to-date information; those in use for 1973 are shown in Table 5. Headings marked by an asterisk are for composite items, and the factors used may vary from year to year with any change in the composition or proportion of the various foods included. The only aggregates for all foods are those in terms of calories and nutrients in Tables 3 and 4.

The figures are all national averages. They represent not what any particular individual obtains, but what, on average, is available to the whole population for consumption. They are the only available figures for total consumption by the population as a whole, and the only means of comparing the overall food position in different periods of time.

Trends in food supplies 1970-1973

These estimates show a gradual change in eating habits, accelerating in the last year. Consumption of animal products generally has declined, the exception being dairy products; that of fish continues its slow downward trend, but consumption of pulses and nuts, fresh and canned fruit and vegetables (excluding potatoes) has increased. Consumption of grain products, sugar and syrups and oils and fats has also fallen slightly over the period, with a greater decrease in consumption of potatoes and potato products. Tea consumption continued to fall, while supplies of coffee (5.9 lb. per head) appear to have risen sharply in 1973. Actual consumption, however, may be significantly lower, since stocks of processed coffee held by manufacturers and distributors are believed to have risen towards the end of the year.

Overall consumption of dairy products expressed in terms of milk solids rose only very slightly over the four-year period, but there were greater fluctuations in individual commodities. Average consumption of liquid milk was 3½ pints less per head in 1971 than in 1970, but by 1973 had returned to just below the 1970 level. Within the total there was a drop in consumption of welfare milk (37.7 pints in 1970 to 16.7 pints in 1971 and 6.2 pints by 1973), reflecting changes made in school and welfare milk arrangements; this was however almost offset by the rise in consumption of full priced milk. Consumption of condensed and skimmed milks fell slightly, while cheese, cream and milk used in manufacturing increased. Yoghurt consumption at 3.2 lb. per head has been calculated separately for the first time in 1973. Yoghurt was previously included in milk used in manufactured products not elsewhere specified.

Available supplies for consumption of all meats rose from 132.1 lb. per head per annum in 1970 to 134.5 lb. in 1972, mainly owing to increasing supplies of pork and poultry meat, but fell to 126.5 lb. per head (edible weight) in 1973. Supplies of beef were decreasing throughout the four-year period, the continued increase in imports of boneless beef (from 5.6 lb. per head in 1970 to 7.7 lb. in 1973) being more than offset by reduced supplies of bone-in beef (down, from 41.6 lb. per head in 1970 to 33.7 lb. in 1973). This reduction was partly offset by increases in consumption of pork and poultry. There was an overall increase of nearly 10 per cent in pork (home production of which rose in 1973), from 24.4 lb. per head in 1970 to 26.8 lb. in 1973 although this was slightly below the 1972 level. Poultry consumption showed an increase of 9 per cent over the period, although again there was a slight reduction in 1973 compared with 1972 Consumption of offal and canned meat showed little change over the period.

Fresh fish consumption declined steadily, falling from 16.1 lb. per head in 1970 to 13.6 lb. per head in 1973. Shellfish, on the other hand, increased by 0.4 lb. per head (33 per cent) and imported canned fish by 0.6 lb. per head (26 per cent).

TABLE 3 Nutrient equivalent of supplies of food per head per day moving into consumption in the United Kingdom

		1970	1971	1972	1973
I. FOOD					
Protein:					
Animal	g.	52.5	52.7	52.8	51.3
Vegetable	g.	33.7	32.3	32.6	33.3
Total	g.	86.2	85.0	85.4	84.6
Fat from all sources	g.	145	144	143	141
Fatty acids: saturated	g.	—	—	63.5	65.9
monounsaturated	g.	—	—	56.7	53.5
polyunsaturated	g.	—	—	15.6	14.8
Carbohydrate (a)	g.	390	385	386	386
Calcium	mg.	1,120	1,120	1,110	1,120
Iron	mg.	15.1	14.9	15.0	14.8
Vitamin A	iu.	4,400	4,380	4,550	4,340
Vitamin A, retinol equivalents	µg.	1,320	1,320	1,370	1,300
Thiamin	mg.	1.89	1.89	1.90	1.89
Riboflavin	mg.	1.90	1.89	1.96	1.97
Nicotinic acid (b)	mg.	20.2	20.4	20.3	20.8
Nicotinic acid equivalents (c)	mg.	35.4	35.1	35.7	35.9
Vitamin C	mg.	101	100	99	99
Vitamin D	iu.	118	119	126	129
Vitamin D	µg.	2.94	2.98	3.15	3.23
Energy value	kcal.	3,110	3,080	3,070	3,050
	MJ (d)	13.0	12.9	12.8	12.8
Energy value (calculated on FAO factors)	kcal.	3,190	3,160	3,150	3,130
	MJ (d)	13.3	13.2	13.2	13.1
II. ALCHOLIC DRINK (not included in Section I of this table)					
Energy value	kcal.	129	136	142	154

(a) Available carbohydrate expressed as monosaccharides.

(b) Total nicotinic acid.

(c) Available nicotinic acid plus the contribtion from tryptophan (new series from 1969).

(d) 1,000 kilocalories (kcal.) = 4.184 megajoules (MJ).

TABLE 4 Percentages of total energy supply derived from each major food group, and from protein, fat and carbohydrate (a)

	1970	1971	1972	1973
Dairy products (excluding butter)	12	13	12	13
Meat (including canned meat and bacon)	17	17	17	16
Oils and fats (including butter)	19	18	18	18
Sugar and syrups	17	17	18	17
Potatoes	5	5	5	5
Grain products	22	22	22	23
Other foods	8	8	8	8
Total	100	100	100	100
Protein	11	11	11	11
Fat	42	42	42	42
Carbohydrate	47	47	47	47

(a) Excludes energy derived from alcoholic drink.

Consumption of eggs in shell rose from 251 eggs per head in 1970 to 255 in 1971, but then declined to 244 in 1973. Consumption of egg products fell over the four-year period by 6 eggs per head (in terms of shell egg equivalent), a reduction of 25 per cent.

Total usage of oils and fats (converted to net fat content) decreased from 51.3 lb. per head in 1970 to 48.8 lb. in 1972, but recovered in 1973 to 50.1 lb. Usage of the spreading fats (butter and margarine) fell steadily during the four years, being nearly 6 per cent down (1.8 lb. per head) compared with a 10 per cent reduction in the consumption of bread (shown in Table 6) over the same period. Between 1970 and 1972 supplies of butter fell by 3.9 lb. per head as against a rise of 2.0 lb. per head in margarine. Although the downward trend in total use of spreading fats continued in 1973, consumption of butter (up 0.8 lb. per head on 1972) improved against margarine (down 0.9 lb.).

With the exception of 1971, total fruit consumption remained stable during the four years; this however concealed changes taking place between types of fruit. Consumption of fresh citrus fruit fluctuated widely owing to variations in supply. Other fresh fruit, including apples, pears, soft and stone fruits, declined steadily from 54.5 lb. in 1970 to 48.8 lb. per head in 1973, a fall of about 10 per cent. In contrast, supplies of canned fruit rose between 1971 and 1973 and were 12 per cent greater in 1973 than in 1970. The greatly increased imports recorded during 1973, may not, however, have moved into actual consumption at that stage, being held as stocks by manu-

facturers and distributors. Over the four years consumption of imported fruit juices rose steadily by 44 per cent, from 5.4 lb. in 1970 to 7.8 lb. in 1973. Imported fruit pulp also increased, by 43 per cent, from 1.4 lb. in 1970 to 2.0 lb. in 1973. Consumption of dried fruit, however, fell by 0.5 lb. per head between 1972 and 1973, reflecting higher world prices.

Consumption of potatoes decreased steadily between 1970 and 1972, but there was an upturn in 1973 to 216.5 lb. per head, as compared with 228.2 lb. per head in 1970. Other vegetables, however, increased in total from 138.8 lb. in 1970 to 147.5 lb. per head in 1973 (about 6 per cent). Consumption of fresh tomatoes fell by 6 per cent while canned tomatoes increased by over 30 per cent, from 6.9 lb. per head in 1970 and 1971 to 9.0 lb. per head in 1973. With the exception of cabbages and greens, which remained fairly stable, consumption of other vegetables within this group rose throughout the period.

Usage of grain and grain products declined in total, between 1970 and 1973, mainly because of a fall of 4.4 lb. per head in usage of wheat flour, owing to the drop in bread consumption – see Table 6. Oat products increased by 0.6 lb. per head between 1970 and 1972, but then declined by 0.2 lb. in 1973. Consumption of breakfast cereals increased steadily from 6.8 lb. per head in 1970 to 7.9 lb. in 1973, about 16 per cent. Rice consumption also increased, from 3.0 lb. in 1970 to 3.7 lb. in 1973.

Tea drinking continued to decline during the period, falling from 8.6 lb. per head in 1970 to 7.5 lb. per head in 1973, a drop of about 13 per cent. On the other hand supplies of coffee available to the consumer, after a slight fall in 1972, rose quite sharply in 1973 to 5.9 lb. per head, 1.5 lb. up on 1970. This figure, however, is probably inflated by increased stocks of processed coffee held by manufacturers and distributors at the end of the year.

TABLE 5 Factors for converting weight to common denominators in 1973 (a)

I. DAIRY PRODUCTS (excluding butter) to milk solids	
Liquid milk	0.124
Cream (40 per cent fat content)	0.456
Cheese	0.66
Evaporated milk, full cream, unsweetened	0.31
Condensed milk, full cream, sweetened	0.31
*Condensed milk, machine skimmed	0.217
includes: Condensed milk, unsweetened	0.20
Condensed milk, sweetened	0.26
Dried whole milk	0.95
Dried skimmed milk	0.95
Yoghurt (b)	0.145
II. MEAT (product weight to edible weight)	
Beef – bone in	0.84
Beef – bone out	1.00
Mutton and lamb	0.86
Pork	0.78
Offal	1.00
*Canned meat (imported)	1.025
includes: Canned corned meat	1.43
Canned pig products	0.90
Canned tongue	1.00
Canned and fresh sausages	0.75
Canned bacon and ham	0.80
Canned poultry	1.00
Other canned meat	0.75
Other meat products	0.80
Bacon and ham	0.89
*Poultry	0.70
Game and rabbits	0.81
V. OILS AND FATS (product to fat content)	
Butter	0.825
Margarine	0.853
Lard and compound cooking fat	0.99
*Other edible oils and fats	0.999
includes: Dripping	0.99
Edible oils and fats	1.00
Cocoa butter	1.00
VI. SUGAR AND SYRUPS (product to sugar content)	
Sugar	1.00
Honey	0.77
*Glucose	0.862
includes: Glucose liquid	0.82
Glucose powder	1.00
VII. FRUIT (product to fresh equivalent)	
Canned fruit	0.80
Imported fruit juices (in natural strength)	2.00
Imported fruit pulp	0.85
Imported dried fruit	4.00
X. OTHER VEGETABLES (product to fresh equivalent)	
*Imported canned tomatoes (including juice and puree)	1.612
includes: Canned tomato puree and paste	2.50
Canned tomato juice	1.00
*Other canned vegetables	1.246
includes: Canned carrots	1.15
Canned peas (fresh)	1.51
Canned other vegetables	1.10

(a) The commodities marked by an asterisk are composite items and the factors used may vary from year to year with any change in the composition or proportion of the various foods included.

(b) Natural yoghurt.

TABLE 6 Consumption per head of some food products as finally purchased (a) (lb. per head per annum)

	1970	1971	1972	1973 (prov.)
Bread	127.5	120.9	118.2	115.1
Flour	21.1	21.6	20.4	19.9
Cakes	22.1	21.3	20.4	19.4
Biscuits	22.2	22.1	22.4	22.4
Beef and veal (b)	28.9	29.4	25.9	23.9
Mutton and lamb (b)	19.5	20.2	18.8	16.9
Pork (b)	10.5	11.3	11.7	11.4
Poultry (including game and rabbits) (b)	22.7	22.4	26.3	26.8
Canned meat	12.8	12.1	12.6	12.8
Sugar (visible) (c)	60.2	56.7	54.9	50.0
Canned vegetables	36.2	34.3	34.8	35.1
Frozen vegetables	6.7	7.3	8.4	10.4
Chocolate confectionery	12.7	13.0	14.1	15.1
Sugar confectionery	11.6	12.0	12.0	12.2
Soft drinks (pints per head)	90.8	89.8	92.5	100.0
Ice cream (£ per head at current prices)	1.73	1.75	1.84	2.18

(a) The ingredients of these foods are included in the quantities shown in Table 1.

(b) Weight as purchased; excludes usage in manufactured products, such as sausages and meat pies.

(c) Excludes sugar content of manufactured foods.

Source: Ministry of Agriculture, Fisheries and Food.

Alcoholic drinks

The estimates of consumption of alcoholic drink in Section XIII of Table 1 are based on statistics collected by HM Customs and Excise of quantities of spirits, beer and wines retained for use in the United Kingdom. Following the trend of earlier years consumption of all alcoholic drinks continued to increase during the period. Between 1970 and 1973 consumption of spirits rose by 53 per cent, from 2.8 proof pints per head in 1970 to 4.3 proof pints per head in 1973. Consumption of wine rose by 70 per cent, from 6.6 pints per head to 11.2 pints, and that of beer by 10 per cent from 178.6 pints per head in 1970 to 197.0 pints in 1973.

Nutrient content of food supplies

The nutritional value of the total food supplies moving into consumption is shown in Table 3, extending the results which were published last year from 1955 (*Trade and Industry* (1973), *12* (9), 459-466). The estimated energy content of food supplies continued to decline in 1973 because of a slight decrease in the availability of animal protein and of fat; but the energy content of food and drink together shows little change from 1971, because of the increased consumption of alcoholic drink. These changes were accompanied by slight decreases in the iron and vitamin A and increases in the nicotinic acid and vitamin D content of the food supply. The relative contributions of major groups of foods to the energy content shown in Table 4 are one of the most stable features of the national diet.

The fatty acid content of total food supplies was estimated for the first time in 1972. In 1973, the average fat content of the food available was 141 g. per head per day and this contained the equivalent of 66 g. of saturated fatty acids, 53 g. of monounsaturated fatty acids and 15 g. of polyunsaturated fatty acids. The major contributors to the intake of polyunsaturated fatty acids were visible oils and fats (54 per cent), meat and meat products (25 per cent), grain products and pulses and nuts (11 per cent). Substantial amounts of saturated fatty acids were obtained from visible oils and fats (43 per cent), meat and meat products (28 per cent) and milk, cream and cheese (23 per cent).

Consumption of food as finally purchased

Consumption per head of some of the major foods measured at the point of final sale are given in Table 6. These foods are included in their ingredient form in the earlier tables: for example, the main ingredients of bread, cakes and biscuits appear in Table 1 as part of the totals shown for flour, sugar and fats. The estimates have been compiled from information used in the preparation of the National Accounts.*

Purchases of bread and flour declined over the period under review and by 1973 there was a total decrease of 13.6 lb. per head since 1970, equivalent to a fall of 9 per cent per head. Purchases of cakes

* *National Accounts Statistics: Sources and Methods*, ed. Rita Maurice, HMSO, 1968.

decreased steadily, but the consumption of biscuits was maintained. Between 1970 and 1973 total purchases of unprocessed beef and veal and mutton and lamb fell by 7.6 lb. per head (weight as purchased by housewives) but purchases of pork and poultry increased by 5.0 lb. per head.

Purchases of canned meat rose from 12.6 lb. per head in 1972 to 12.8 lb. in 1973, the same level as in 1970, and total purchases of canned and frozen vegetables increased over the period.

Purchases of sugar (as such) decreased from 60.2 lb. per head in 1970 to 50.0 lb. in 1973. Chocolate and sugar confectionery both continued their upward trends.

Purchases of soft drinks at 109 pints per head in 1973 showed an increase of 10 per cent compared with 1970.

New companies incorporated in Northern Ireland during July

During July, 43 private companies and one public company with a total nominal capital of £660,700 were incorporated in Northern Ireland.

During the period January-July, 364 companies with a total nominal capital of £5,375,350 were incorporated, as compared with 427 companies with a total nominal capital of £3,548,661 incorporated in the same period in 1973.

Index of retail sales in Northern Ireland

The seasonally adjusted index of retail sales in Northern Ireland for June was 175 (1965 = 100), 14 per cent more than in June 1973.

After allowing for price changes, the total volume of sales in June showed a decrease of 4 per cent on a year earlier.

The seasonally adjusted index numbers of the value of sales in June and the second quarter of 1974 and percentage increases on a year earlier for the main groups of traders are shown below. More detailed information can be obtained from the Department of Commerce, Index of Retail Sales, 21 Linenhall Street, Belfast BT2 8BZ (tel: Belfast (0232) 28081, ext. 140).

		June 1974		2nd quarter 1974	
Sales by:	Sales 1965 – £m	Seasonally adjusted value index numbers 1965 = 100	Percentage increases	Seasonally adjusted value index numbers 1965 = 100	Percentage increases
All kinds of business	219	175	14	166	11
Food shops	97	176	14	185	18
Non-food shops	122	175	14	150	5
Of which:					
Clothing and footwear shops	36	160	15	139	3
Durable goods shops	21	183	–1	149	–6
Miscellaneous non-food shops	43	201	21	178	14
Department and general stores	22	143	13	118	1

Registrations of British, Community and foreign films

The following are details of films registered by the Department of Trade under the Films Acts 1960 to 1970, as amended by the European Communities Act 1972, during the week ended Friday, 30 August 1974.
BR/E indicates that the film is a British quota film, EC that the film is a quota film. The date which forms part of the registration number of each is the date on which quota life of the film expires.

Title of film	Registered no.	Playing time minutes	Date of registration	Registered in the name of	Maker's name
			BRITISH		
Confessions Of A Window Cleaner	BR/E 37674/1/9/79	90	28 August	Columbia-Warner Distributors Ltd.	Swiftdown Ltd.
Movietone News 2360	BR/E 37566/1/9/79	7	30 August	British Movietonews Ltd.	British Movietonews Ltd.
Movietone News 2360A	BR/E 37567/1/9/79	8	30 August	British Movietonews Ltd.	British Movietonews Ltd.
Persecution	BR/E 37675/1/9/79	95	28 August	Doverton Films Ltd.	Tyburn Productions Ltd.
The Vintage	BR/E 37676/1/9/79	7	29 August	Columbia-Warner Distributors Ltd.	Film Australia, New South Wales, Australia
			FOREIGN		
The Take	F 37673	92	28 August	Columbia-Warner Distributors Ltd.	World Film Services Ltd.
The Naughty Stewardesses	F 37677	101	29 August	Tigon Film Distributors Ltd.	Independent-International Pictures Corporation, New York

Correction to the Register:
The registration number of the film 'Gold', registered on 15 August 1974, has been corrected to BR/E 37667/18/8/79.

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A = annually M = monthly Q = quarterly 6M = every six months.

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Air transport: trade by air (6M)	30 May 1974
Balance of payments:	
current account (M)	22 Aug. 1974
trends in invisible transactions (Q)	18 Apr. 1974
(*see also* Overseas trade of the UK)	
Bankruptcy orders (Q)	6 June 1974
Business names and limited partnerships (A)	7 Mar. 1974
Capital expenditure: manufacturing, distributive and service industries (Q)	This week
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Chemicals industry activity (Q)	8 Aug. 1974
Companies:	
acquisitions and mergers (Q)	30 May 1974
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Guide to Departments	This week
Official Receivers' offices	This week
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